PaperVision® Capture

User Guide

PaperVision Capture Release 74

August 2011

Information in this document is subject to change without notice and does not represent a commitment on the part of Digitech Systems, Inc. The software described in this document is furnished under a license agreement or nondisclosure agreement. The software may be used or copied only in accordance with the terms of the agreement. It is against the law to copy the software on any medium except as specifically allowed in the license or nondisclosure agreement. No part of this manual may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying and recording, for any purpose without the express written permission of Digitech Systems, Inc.

Copyright © 2011 Digitech Systems, Inc. All rights reserved.
Printed in the United States of America.

PaperVision Capture and the Digitech Systems, Inc. logo
are trademarks of Digitech Systems, Inc.

PaperVision Enterprise is a registered trademark of Digitech Systems, Inc.

Microsoft, Windows, Windows XP, and Vista are registered trademarks of Microsoft Corporation.
All other trademarks and registered trademarks are the property of their respective owners.

PaperVision Capture contains portions of OCR code owned and copyrighted
by Nuance Communications, Inc. All rights reserved.

PaperVision Capture contains portions of OCR code owned and copyrighted
by Open Text Corporation. All rights reserved.

PaperVision Capture contains portions of imaging code owned and copyrighted
by EMC Corporation. All rights reserved.

Digitech Systems, Inc.

8400 E. Crescent Parkway, Suite 500
Greenwood Village, CO 80111
Phone: 303.493.6900 Fax: 303.493.6979
www.digitechsystems.com

Table of Contents

Chapter 1 - Introduction 5
PaperVision Capture Terminology 6
Supported Users in the Operator Console 8
System Requirements 9
Supported Scanners 10
Logging In 10
Logging Out 10
Obtaining Help in PaperVision Capture 11

Chapter 2 - Batch Creation 12
Batches Waiting 12
Batches Owned 13

Chapter 3 – Standard Commands and Menu Options 19
Zoom Zones and Scaling - Order of Operations 23
File Menu 25
Submitting and Creating a New Batch 27
Edit Menu 28
View Menu 45
Batch Navigation Commands (Documents) 46
Batch Navigation Commands (Pages) 47
Toolbars 52
Tools Menu 54

Chapter 4 - Capture Step 56
File Menu 57
Scanner Menu 61
Edit Menu 62
View Menu 62
Indexing in the Capture Step 63
Tools Menu 64
QC Menu 65

Chapter 5 – Indexing Step 66
File Menu 66
Edit Menu 69
View Menu 69
Tools Menu 69
QC Menu 70

Table of Contents

Chapter 6 – Manual Quality Control (QC) Step.....71
File Menu.....72
Edit Menu.....72
View Menu.....72
QC Menu Operations.....74
QC Auto Play Operations.....74
Using the QC Auto Play Operations.....75
QC Tags.....76
Applying Document Tags.....77

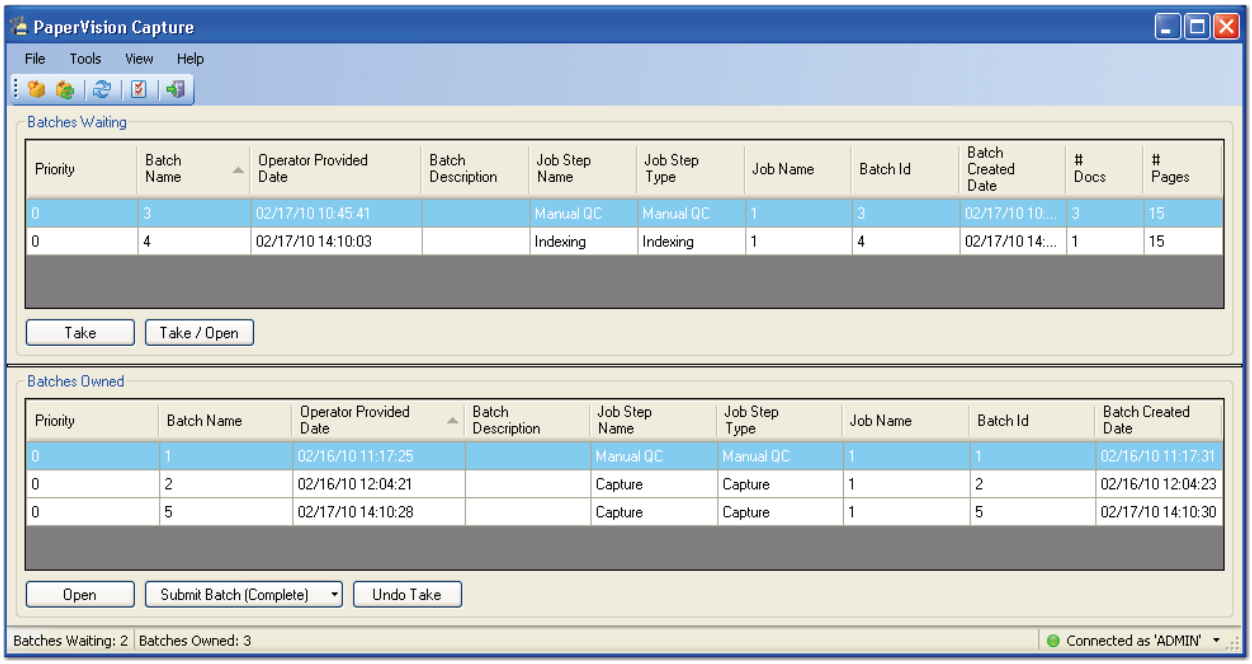
Chapter 7 - Operator Console Settings.....82
Scanner Settings.....82
Indexing Preferences.....86
Display Preferences.....88
System Preferences.....90
Import Preferences.....92
Confirmation Messages.....93
Hot Keys.....95
Toolbars.....101

Appendix A – Additional Help Resources.....110

Chapter 1 – Introduction

The PaperVision Capture Operator Console provides scanning, indexing, quality control, and batch processing capabilities. After you log in to the PaperVision Capture Operator Console, the main window appears where you can manually create batches, assume batch ownership, open batches, and submit batches. Once you create a batch, you can scan or import images, index documents, and define user settings for the scan and batch display. Contents of a batch can also be edited before marking the batch as complete and submitting it for processing and transition to the next job step.

You have to be assigned to specific job steps by your PaperVision Capture administrator in order to perform specific functions in the PaperVision Capture Operator Console. If you are not able to perform a certain function, such as batch creation, contact your system administrator.



PaperVision Capture Batch Creation

PaperVision Capture Terminology

Batch

A batch is a collection of documents and their associated index name-value pairs and statistics that are moved as a logical unit of work through a job.

Batch Priority

Batch priority refers to the order in which (1) batches awaiting ownership are displayed in the PaperVision Capture Operator Console and (2) batches are processed by the PaperVision Capture Automation Service. Four values are assigned by administrators to calculate the overall batch priority.

- Job age priority is a number associated with the job and is multiplied by the number of elapsed minutes since the batch was created.
- The job step's age priority is a value associated with the current job step and is multiplied by the number of elapsed minutes the batch has been waiting in the current step.
- The job step priority is a value associated with the current job step and assigned by an administrator.
- Administrative priority is a value associated with each specific batch. To have a significant impact on the overall calculation, administrators can assign a wider range of values (0-999,999) to this priority.

Administrators assign numbers to indicate batch urgency and assist with scheduling and resource allocation. The system uses these numbers, which range from 0 (not urgent) to 100 (urgent), to schedule system resources and assign higher-priority batches to users. Batch priority helps administrators efficiently manage job loads and enables the system to automatically assign prioritized batches to operators in a round-robin fashion.

The overall batch priority is calculated as follows:

(Job age priority x elapsed minutes since batch was created) + (step age priority x elapsed minutes batch has been waiting in current step) + job step priority + administrative priority

Detail Sets

Detail sets expand on the capabilities of standard index fields because they define "many-to-one" relationships, which allow multiple sets of field data to reference a single document. In a many-to-one relationship, an index field contains a value that references another field or set of fields that contain unique values.

Document

A document is the equivalent of a file folder within a filing cabinet. A document holds all of the pages for a given set of index values.

Image

An image is a visual representation of a picture or graphic, such as an electronic file with the extension .bmp, .jpg, or .tif.

Index

An index is a value that users apply to a document for reference and retrieval.

Job

A job is a defined process comprised of one or more job steps through which batches are processed. At a minimum, each job must contain a start step. Each job is unique by name within an entity.

Job Step

A job step is an automated or manual operation that is performed on a batch. Manual job steps are performed by assigned users through the PaperVision Capture Operator Console; automated job steps are completed by the PaperVision Capture Automation Service, and require no user intervention.

Master Batch Repository

The Master Batch Repository is the centralized storage area where PaperVision Capture stores all captured images. When installing PaperVision Capture in an environment containing multiple PaperVision Capture Gateways or PaperVision Capture Automation Servers, this location should be a network accessible location (e.g., **SERVER\SHARE**).

Page

One or more images (files with extensions .bmp, .jpg, or .tif) comprise a single page within a document. For example, a page can include the originally captured image and a manipulated version of the image after noise removal.

PaperVision Capture Administration Console

The PaperVision Capture Administration Console provides administration and job configuration capabilities.

PaperVision Capture Automation Service

The PaperVision Capture Automation Service is a Microsoft® Windows service that performs automated tasks and batch processing at specified time intervals. Examples of work performed by the PaperVision Capture Automation Service include the consumption of statistics when an operator completes a batch and the processing of automated job steps. Multiple Automatic Services can be installed on distinct machines or multiple PaperVision Capture Automation Service processes may be configured to run on the same machine.

PaperVision Capture Data Transfer Agent Service

The PaperVision Capture Data Transfer Agent Service is a Microsoft® Windows service that moves batches in local temporary batch repositories to/from the Master Batch Repository.

PaperVision Capture Gateway Server

The PaperVision Capture Gateway Server is an application server that enables communication between PaperVision Capture modules and provides access to databases and the Master Batch Repository in distributed deployment scenarios.

PaperVision Capture Operator Console

The PaperVision Capture Operator Console provides scanning, indexing, and batch processing capabilities.

Supported Users in the Operator Console

PaperVision Capture supports users, also known as operators, who work in the PaperVision Capture Operator Console. If you are assigned to a job step, you have access to every function configured for that job step such as scanning, indexing, and batch processing.

System Requirements

The following tables outline the minimum software requirements and recommended hardware requirements for the PaperVision Capture application.

Minimum Software Requirements	
Operating Systems	Windows XP Pro SP3 or later (both 32- and 64-bit operating systems supported)
.NET Framework	Version 3.5 SP1 or later (included on installation media)
Windows Installer	Version 3.1 or later (included on installation media)
Microsoft SQL Server	SQL Server 2000 or later **Note**: SQL Server 2008 R2 Express Edition is included on installation media.

Recommended Hardware Requirements	
Processor	Current processor technology is recommended (typically, not older than four years).
RAM	2 GB
Hard Disk Space	1750 MB
Minimum Screen Resolution	1024 x 768

Supported Scanners

PaperVision Capture supports more than 300 ISIS-compatible scanners. If you need additional scanner drivers, please contact Digitech Systems' Technical Support at support@digitechsystems.com or by phone at (877)374-3569. If the driver is available, our support personnel will assist you in obtaining the driver.

PaperVision Capture also offers the ability to use TWAIN scanners. The use of TWAIN scanners is generally intended for extremely low-volume scanners as ISIS drivers are available for most scanners on the market.

Logging In

When you log in to the PaperVision Capture Operator Console, the system authenticates you based on the information you provide. When the PaperVision Capture Operator Console is launched for the first time, you will be prompted to log into the system. If this is your first time logging in, contact your system administrator for your user name and password information. If your administrator has enabled Windows Authentication, you can select the **Use Windows Authentication** check box to avoid entering your user name and password during each login.

Only one user can log into a single installation of the PaperVision Capture Operator Console, but multiple users (i.e., multiple users who remotely log into a terminal server) can log into a single installation of the PaperVision Capture Operator Console (if the administrator has configured the Operator Console accordingly).

> **Note:**
>
> Passwords are case-sensitive.

Logging Out

To log out and close the PaperVision Capture Operator Console, select **File > Exit.** If you have any unsaved changes, you will be prompted to save those changes before you are logged out of the system. Alternatively, you can log out of the PaperVision Capture Operator Console so another user can log into the system.

To log out and log in as another user:

1. In the batch creation screen, select the down arrow next to **Connected as 'User Name'** in the lower right section of the Status Bar.
2. Select **Log In as Another User.**
3. Select **Yes** if you want to log out of the system, and the **Login** prompt will appear. The Status Bar will display a **Disconnected** status to indicate the initial user is no longer logged into the system.
4. Or, select **No** to cancel the logout and to remain logged into the system.

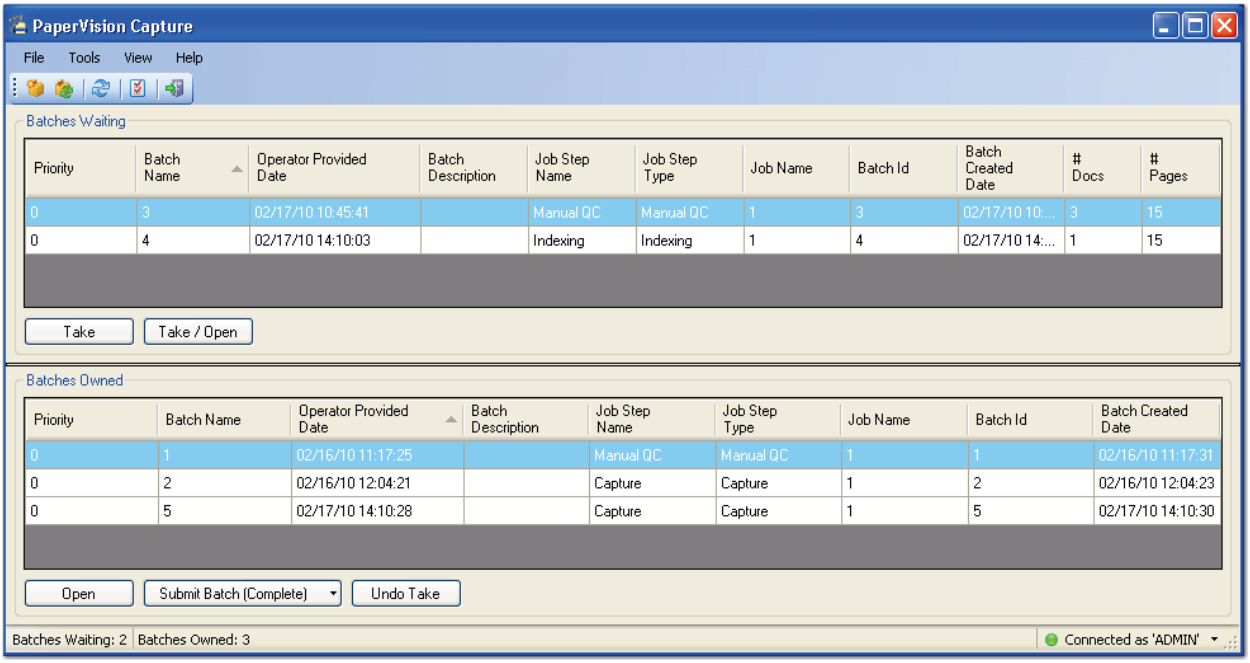
Obtaining Help in PaperVision Capture

To obtain Help from any page within the PaperVision Capture Administration Console, click the **Help** button or press the **F1** key to open a topic related to the screen you are currently viewing. Additionally, every screen in PaperVision Capture contains the **Help** menu, which contains the following items:

- **Help > Help Topics** opens the Online Help file.
- **Help > User's Manual** opens a PDF of the PaperVision Capture User Guide.
- **Help > About PaperVision Capture Operator Console** displays a splash screen with the copyright and version information for your version of PaperVision Capture.

Chapter 2 – Batch Creation

Once you log into the PaperVision Capture Operator Console, the batch creation screen appears. If you are assigned to the Capture job step, you can configure the batch creation settings, create new batches, assume batch ownership, open batches, and submit batches from the batch creation screen. You can also re-transmit batches from the batch creation screen if they encountered processing errors during submittal.



Batch Creation

Batches Waiting

The **Batches Waiting** list displays batches that are awaiting ownership. No operators are currently processing these batches. To refresh the list, click the **Refresh** icon in the toolbar.

> **Note**:
>
> Values for document and page numbers reflect totals from the most recent time the operator submitted the batch. These values do not reflect changes to a batch currently owned by the operator.

Taking Ownership of Batches

To assume ownership of one or more batches, highlight the batch(es) in the **Batches Waiting** list, and then click the **Take** button. Your selected batch(es) will move to the **Batches Owned** list.

Taking and Opening Batches

To assume ownership of one or more batches and subsequently open the batch(es), highlight the batch(es) in the **Batches Waiting** list, and then click the **Take/Open** button. The applicable step screen will open for the first selected batch.

Batches Owned

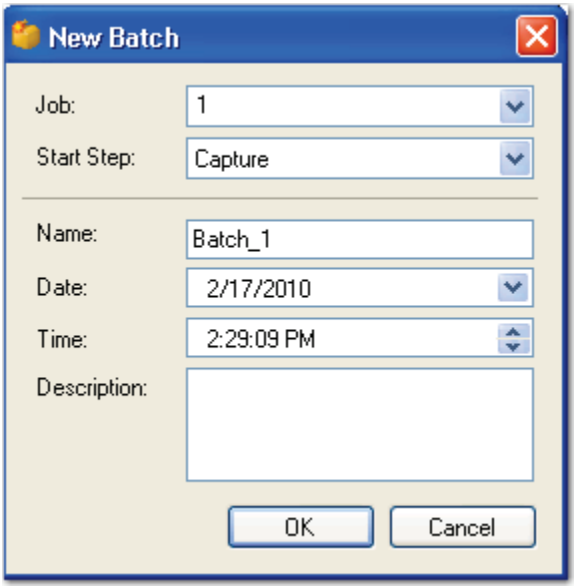
The **Batches Owned** list contains batches that are owned and that you can open and process.

Creating a New Batch

Only users who have access to a Capture start step can create new batches in the Operator Console. If you attempt to create a new batch for a job that has been deleted, deactivated, or whose start step has been deleted, a message prompt will inform you of the job deletion, deactivation, etc., so you will not be able to create new batches in those scenarios.

To create a new batch:

1. Click the **New Batch** icon, and the **New Batch** dialog box appears.



New Batch

2. Select the job from **Job** drop-down list.
3. Select the start step from the **Start Step** list.

> **Note:**
>
> If you are unsure which job or start step to select, contact your PaperVision Capture administrator.

4. Enter the name of the batch in the **Name** field.

> **Tip:**
>
> To auto-populate information from the previous batch, open **Tools > Options** and select the **Populate new batch with previous batch information** option.

5. Enter or select the date in the **Date** field, if applicable.
6. Enter or select the time in the **Time** field, if applicable.
7. Enter a description in the **Description** field, if necessary.
8. Click **OK.**

Opening Batches

To open a batch in the **Batches Owned** list, highlight the batch, and then click the **Open** button.

> **Note:**
>
> Although you may own more than one batch at a time, you may only work on a single batch at a time in the PaperVision Capture Operator Console.

Submitting Complete Batches

Submitting a complete batch processes and transitions it to the next job step.

To submit complete batches:

1. In the **Batches Owned** list, highlight the batch.
2. Click the **Submit Batch Complete** button.
3. Click **OK** to proceed with the submittal.

Submitting Incomplete Batches

Submitting an incomplete batch allows you or another operator to assume ownership and continue processing (index, scan, etc.,) the batch at a later time, and does not transition the batch to the next job step. This command moves the batch to the Batches Waiting queue.

To submit incomplete batches:

1. In the **Batches Owned** list, highlight the batches.
2. Click the drop-down arrow in the **Submit Batch Complete** button.
3. Select **Submit Batch (Incomplete)**.
4. Click **OK** to proceed with the submittal.

Undoing Batch Ownership

If you no longer want to own a batch, you can release it to the **Batches Waiting** queue. Any work you have performed on the batch will be removed.

To undo the ownership of a batch:

1. Highlight the batch.
2. Click the **Undo Take** button.
3. A confirmation message appears; click **OK** to proceed.

> **Tip:**
>
> If you make mistakes while you work on a batch and you want to discard all of your work, use the **Undo Ownership** command.

Retransmitting Batches

You can re-submit batches in case you encounter errors during a prior batch submittal.

To retransmit batches:

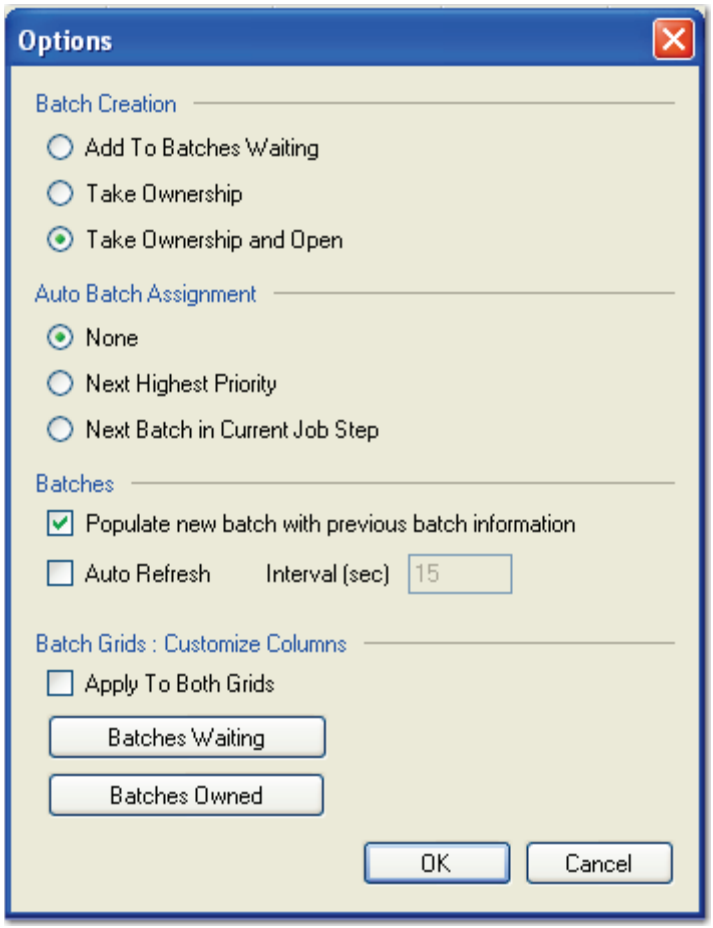
1. Click the **Retransmit Batch** icon.
2. Click **OK** if the **No batches require retransmittal** message appears.

Assigning Batch Settings

In the batch creation screen, you can configure how batches are moved to queues, how batches are assigned, and how columns in the batch lists appear in the screen.

To assign batch settings:

1. Click the **Options** icon, and the **Options** dialog box appears.



Options

2. Assign the **Batch Creation, Auto Batch Assignment, Batches** and **Batch Grids** settings that are described in the next page, and then click **OK** when finished.

Batch Creation

These options allow you to select how batches are moved to queues. These options only apply to newly-created batches and do not apply to all batches in the job step. For example, if you select **Take Ownership and Open**, any newly-created batch will automatically be assigned to you before the PaperVision Capture window opens.

- If you want batches to appear in the Batches Waiting queue after they are created, select **Add to Batches Waiting.**
- To automatically assume ownership of batches as they are created, select **Take Ownership.**
- To automatically assume ownership of batches and subsequently open them, select **Take Ownership and Open.**

Auto Batch Assignment

These options allow you to select how batches are assigned to you after you submit a batch.

- To return to the batch creation screen, select **None,** which is the default option.
- To be taken to the batch with the next highest priority, select **Next Highest Priority**. If no batches are found, you are returned to the batch creation screen.
- To be taken to the next batch in the current job step (i.e. the job step you most recently worked on), select **Next Batch in Current Job Step.** For example, if you are indexing a batch and click **Submit**, then you are taken to the next batch ready for indexing. This option does not use batch priority in its assignment. If no batches are found, you are returned to the Batch Creation screen.

Batches

Select **Populate new batch with previous batch information** to automatically populate information from the last entered batch as you create a new batch. Select **Auto Refresh** to automatically update the list of batches in the batch creation screen. By default, the refresh interval is 15 seconds, but you can assign another value (in seconds).

Note:

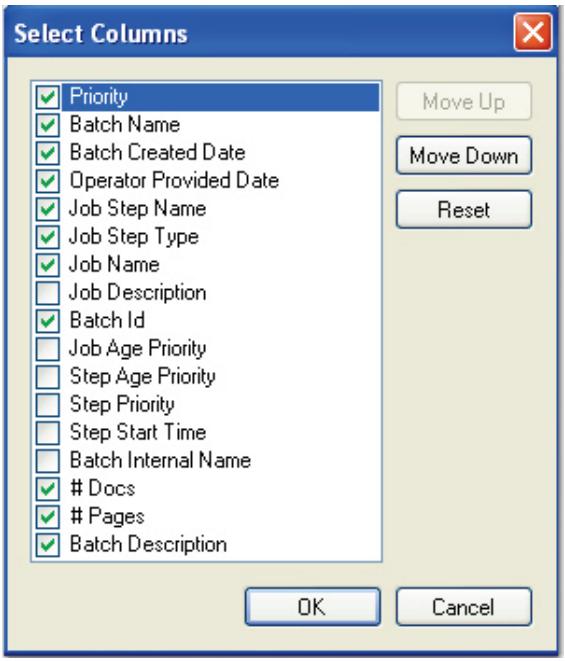
You must assign a value of 15 seconds or greater for the Auto Refresh interval.

Customizing Columns

These settings allow you to select the columns that appear in the **Batches Waiting** and **Batches Owned** lists.

To select the columns to display:

1. In the Options dialog box, click the **Batches Waiting** or **Batches Owned** button, which opens the **Select Columns** dialog box.



Select Columns

2. Select the columns to display in the queues.
3. Select the column names once again to hide them from view.
4. To reorder the columns, highlight the column, and then select the **Move Up** or **Move Down** button.
5. To return to the most recently saved order, click the **Reset** button.
6. Click **OK.**
7. To apply the selections to both grids, select **Apply to Both Grids.**

Chapter 3 – Standard Commands and Menu Options

In any job step screen, you can submit complete and incomplete batches, navigate through documents and pages, import images, and customize how pages and documents appear in your workspace. Additionally, you can print and manipulate documents and pages as necessary. If your administrator has provided a custom operation that you can execute from your job step, you can run this operation from any job step. In any job step screen, the Standard toolbar contains the commands that enable you to perform these operations.

> **Tip:**
> Many of the Standard toolbar commands are accessible if you right-click in the main viewing window in single- or multiple-display view. Some commands are not found in menus or may not contain default hot key settings.

The following commands and hot keys are available in all job steps:

Delete Page

Deletes a specified page range within the current document

Menu: Edit

Hot Key: Delete

Copy Pages

Copies a specified page range within the current document

Menu: Edit

Hot Key: Ctrl+C

Cut Pages

Cuts your specified page range within the current document

Menu: Edit

Hot Key: Ctrl+X

Paste Pages

Pastes the copied or cut pages into a destination document before or after a specified page

Menu: Edit

Hot Key: Ctrl+V

Re-Save Page

Re-saves the page after you manipulate it (e.g., change its rotation or page polarity)

Menu: Edit

Hot Key: V

Add Document

Appends a blank document at the end of the batch

Menu: Edit

Hot Key: Shift, Ctrl+A

Delete Document

Deletes the current document and all of its associated pages

Menu: Edit

Hot Key: Ctrl+Delete

Print Document

Prints a specified page range within the current document

Menu: File

Hot Key: P

Single Display

Displays one page at a time in the main window

Multiple Display

Displays a specified number of rows and columns (of pages) at a time in the main window

> **Note:**
>
> For more information on the single and multiple display settings, see the section on the **View Menu** in Chapter 4.

Reset Image

If you have rotated, zoomed in/out, or manipulated the page, resets the page to the original view or returns to the last saved view of the image

Menu: View

Hot Key: Ctrl+T

Invert Pages Polarity

Reverses black text on a white background to white text on a black background or vice versa

Menu: Edit

Invert and Save Pages Polarity

Reverses black text on a white background to white text on a black background or vice versa and then saves the images

Menu: Edit

Rotate Image

Rotates the image 90 degrees clockwise

Menu: View

Hot Key: R

Rotate Save Images

Rotates one or multiple images by 90, 180, or 270 degrees and then saves the images prior to batch submittal

Menu: Edit

Scale to Window

Determines the best method (Scale to Width or Height) to fit the image within the window

Menu: View

Hot Key: Ctrl+W

Scale to Width

Scales the image to the width of the screen

Menu: View

Hot Key: W

Scale to Height

Scales the image to the height of the screen

Menu: View

Hot Key: H

Zoom In

Zooms in on specified area designated by the boundary you draw within the image

Hot Key: Ctrl+Plus Sign

> **Note:**
> You can also use the left mouse button to zoom on an area of the image.

Zoom Out

Zooms out from the last view of the image

Hot Key: Ctrl+Minus Sign

Zoom Zones and Scaling - Order of Operations

In PaperVision Capture, index zoom zones (defined by your administrator in the PaperVision Capture Administration Console), user-defined zoom zones (Zoom In/Out), and scaling (Scale to Height/Width/Window) can be applied to images viewed in the PaperVision Capture Operator Console. Zoom zones and scaling operations are applied in the following order:

1. Any defined index zoom zones take precedence over all zoom zone or scaling settings that have been applied on images in the Operator Console. So, when you navigate to an index field defined by an index zoom zone, the index zoom zone will be applied. If you enable the Hold Zoom Regions system preference, any zoom zone that you apply will be retained until you navigate to an index field defined with a different zoom zone.
2. If you enable the Hold Zoom Regions system preference, any zoom zone that you apply on the image will be retained across all index fields, pages, and documents.
3. If you disable the Hold Zoom Regions system preference, any zoom zone that you apply on the image will not be retained across index fields, pages, and documents.
4. Finally, any scaling that you apply on the image takes precedence over the Hold Zoom Regions system preference and any zoom zone that you have applied on the image. However, scaling the image does not impact any defined index zoom zones, which take precedence over all settings and operations.

> **Note**:
>
> For more information, see the section on **Hold Zoom Regions** in Chapter 7.

Insert Document Break

Marks an existing page as the first page of the next document

Menu: Edit

Hot Key: Ctrl+Insert

Remove Document Break

Removes a document break and merges the current document with the previous document once again

Menu: Edit

Hot Key: Ctrl+R

Submit Batch

Submits the batch to the server for transition to the next job step

Menu: File

Hot Key: Shift+S

Submit and Create New Batch

Creates a new batch immediately after submitting a batch

Menu: File

Hot Key: Shift+C

Options

Assigns options for the Capture step, such as scanner, display, system, hot key, and toolbar preferences

Menu: Tools

File Menu

The File menu contains import commands for batches and images. Additionally, this menu contains commands that enable you to submit batches and print documents and pages.

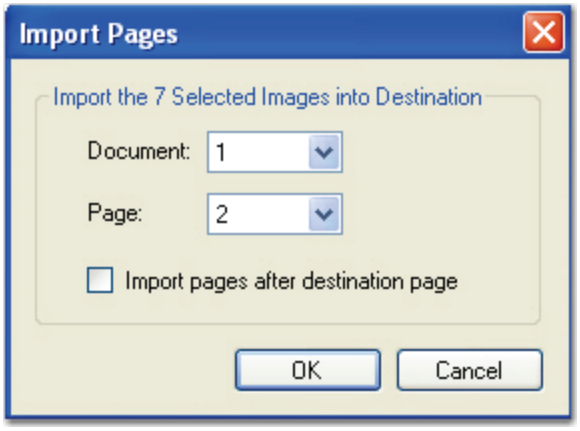
Importing Images

This operation imports images before or after your selected page in the current document. The Import Images operation does not perform barcode recognition, apply page rotation, or insert auto document breaks.

> **Note:**
>
> Your PaperVision Capture administrator grants you access to this command.

To import images:

1. Navigate to the destination page in the document.
2. Select **File > Import Images**.
3. In the **Select Images to Import** dialog box, browse to the directory and select the image(s) to import.
4. Click **Open**, and the **Import Pages** dialog box appears.



Import Pages

5. Select the document number where the images will be inserted.
6. Select the page number where the images will be inserted.
7. If you want the images inserted after the destination page, select **Import pages after destination page**. Otherwise, images are inserted before the destination page.
8. Click **OK**.

Printing Pages

To print pages in the current document:

1. Click the **Print** icon.
2. Select the printing parameters.
3. Click **OK**.

Submitting Complete Batches

Submitting a complete batch processes and transitions it to the next job step.

To submit the batch:

1. Click the **Submit Batch (Complete)** icon.
2. Click **Yes** to proceed with the submittal.

> **Note**:
>
> If you completed the Indexing step, click **Yes** if you want to perform the final index verification before submitting the batch.

Submitting Incomplete Batches

You can submit a batch that has not been completely processed (i.e. indexed or scanned). Submitting an incomplete batch allows you or another operator to assume ownership and complete processing of the batch at a later time, and does not transition the batch to the next job step.

To submit an incomplete batch:

1. Click the **Submit Batch Incomplete** icon.
2. Click **OK** to proceed with the submittal.

> **Tip**:
>
> Select the **Suppress future submit batch messages** option (or the **Suppress future index verification messages** option if you completed the Indexing step) to hide the confirmation messages in the future. To show the message once again, select **Tools > Options > Confirmation Messages,** and select the applicable check box.

Submitting and Creating a New Batch

This command allows you to create a new batch immediately after submitting a complete batch.

To submit and create a new batch:

1. After completing your assigned tasks for the batch, click the **Submit and Create New Batch** icon.
2. Click **Yes** to proceed with the submittal, and the **New Batch** dialog box appears.
3. Enter the new batch name, and complete your assigned tasks in the new batch.

Edit Menu

The Edit menu contains the commands that help you manipulate documents and pages. The Execute Custom Code and Merge Like Documents commands are available if your administrator configures the job step for specific operations.

> **Tip**:
>
> Many of the Edit menu commands are accessible if you right-click in the main viewing window in single- or multiple-display view.

Adding a Document

The Add Document command appends a blank document to the end of the batch. You can subsequently scan and import images into the new document and enter index values (if tasked with this operation). If you are tasked only with hand-key indexing, you can simply enter index values for the new document.

To add a document:

1. Open the appropriate batch.
2. Click the **Add Document** icon. The blank document appears at the end of the batch. You can then import or scan images into the new document (and enter index values if assigned to do so).

Copying a Document

The Copy Document command copies all pages and appends the new document after the selected document.

To copy a document:

1. Open the appropriate document.
2. Select **Edit > Copy Document**.
3. Enter the number of copies to create.

Deleting Documents

The Delete Document command deletes the current document and its associated images.

To delete a document:

1. Open the appropriate document.
2. Click the **Delete Document** icon.
3. To proceed with the deletion, click **Yes**.

Deleting Documents in the Browse Batch Window

If the Browse Batch window is viewable, you can delete one or more documents from the batch. If the document does not contain any pages, the Delete Documents command will be disabled.

To delete one or more documents from the Browse Batch window:

1. Select one or more documents.
2. Right-click and select **Delete Documents**.
3. To proceed with the deletion, click **Yes**.

Inserting a Document Break

This command allows you to mark an existing page as the first page of the next document. This operation also allows you to save index values prior to inserting the document break.

To insert a document break:

1. Navigate to the page where the document break will be placed.
2. Click the **Insert Document Break** icon.
3. If you want to save the index values, click **Yes**.
   - Selecting **No** will not save the index values, but will insert a document break.
   - Selecting **Cancel** will abort both operations.
4. If you want the marked page to be the first page of the new document, click **Yes**.

Removing a Document Break

If you marked a new document and no longer want to keep the document break, you can remove the document break and place the pages from the current document to the end of the previous document.

To remove a document break:

1. Navigate to the page where the document break was placed.
2. Click the **Remove Document Break** icon.

> **Note:**
> You cannot remove a document break for the first document in the batch.

3. Click **Yes** to remove the document break, and the current document will be merged with the previous document.
4. Or, select **No**, and the document break will not be removed.

Shuffling a Document to Duplex

This operation shuffles the first half of the pages, and they become the odd pages. The remaining half of the pages becomes the even pages, and these pages are placed in reverse order.

WARNING!

This operation is irreversible.

To shuffle a document to duplex:

1. Select **Edit > Shuffle Document to Duplex**.
2. In the prompt, click **Yes** to proceed with the shuffle.

Note:

The document must contain an even number of pages to shuffle.

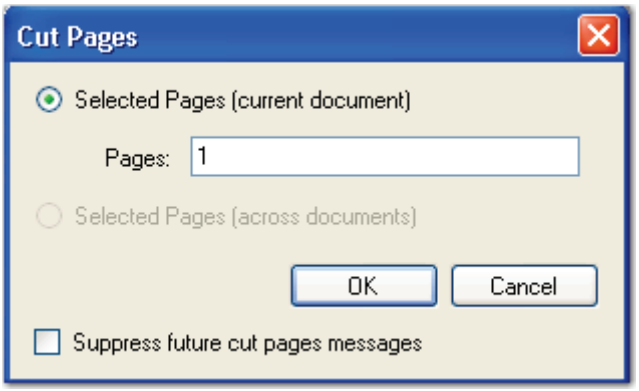
Cutting, Copying, and Pasting Pages

You can cut, copy, and paste one or multiple pages in the single display view (**View > Organization > Single Display**) or multiple display view (**View > Organization > Multiple Display**) using the Edit menu or Standard toolbar commands. Optionally, these operations can be performed in the Thumbnails window (**View > Windows > Thumbnails**). The cut, copy, and paste operations can be performed on consecutive or non-consecutive pages in one document or across multiple documents.

> **Tip**:
>
> You can also right-click on a page or within the multiple display view or Thumbnails window to cut, copy, and paste pages.

To cut and paste pages:

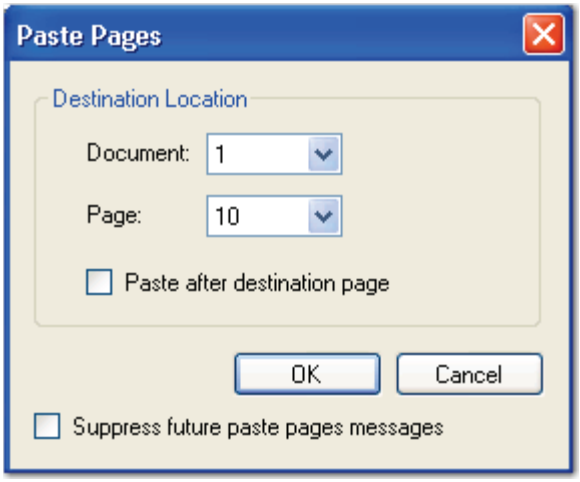
1. Navigate to the page in the document (or, select one or more pages in multiple display or Thumbnails).
2. Click the **Cut** icon. The **Cut Pages** dialog box appears.



Cut Pages

3. If you selected pages within the same document, the first option, **Selected pages (current document)**, is selected. For this option, the selected pages are listed in the **Pages** field. If you selected pages across multiple documents, the second option, **Selected pages (across documents)**, would be selected. Ensure the appropriate option is selected, and then click **OK**.
4. In the Thumbnails window or multiple display view, selected pages appear with the **Cut** icon in the upper right. Navigate to the page in the document where the pages will be pasted.

5. Click the **Paste** icon. The **Paste Pages** dialog box appears.



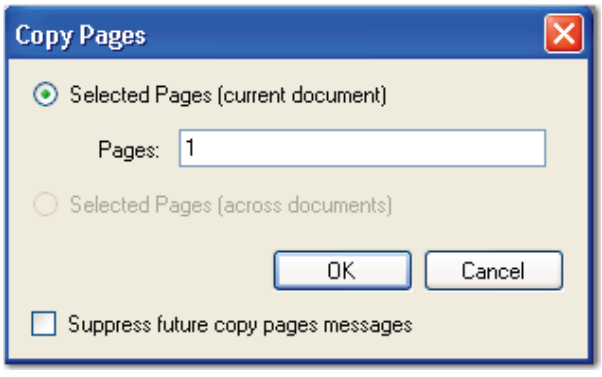
Paste Pages

6. Your selected document and page number appear in the **Paste Pages** dialog box. To change your selection, enter the appropriate document and page number.
7. By default, the pages are pasted directly before your selected location. If you want them pasted after your destination page, select the option, **Paste after destination page**.

> **Tip**:
>
> Select the **Suppress future cut/paste pages messages** options to hide the cut and paste confirmation messages in the future. To show the message once again, select **Tools > Options > Confirmation Messages**, and select the applicable check box.

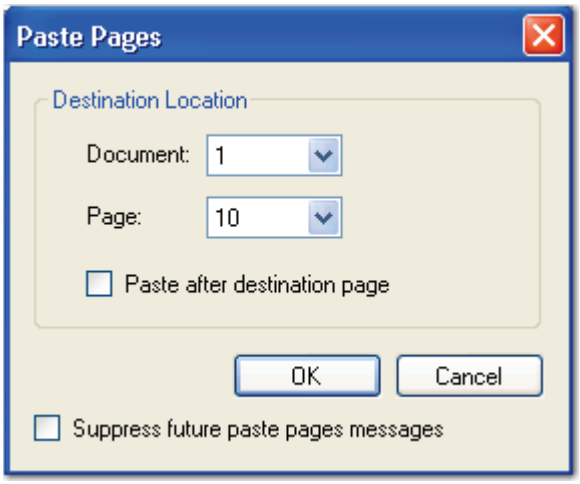
To copy and paste pages:

1. Navigate to the page in the document (or, select one or more pages in multiple display or Thumbnails).
2. Click the **Copy** icon. The **Copy Pages** dialog box appears.



Copy Pages

3. If you selected pages within the same document, the first option, **Selected pages (current document)**, is selected. For this option, the selected pages are listed in the **Pages** field. If you selected pages across multiple documents, the second option, Selected pages (across documents), would be selected. Ensure the appropriate option is selected, and then click **OK**.
4. In the Thumbnails window or multiple display view, selected pages appear with the **Copy** icon in the upper right. Navigate to the page in the document where the pages will be pasted.
5. Click the **Paste** icon. The **Paste Pages** dialog box appears.



Paste Pages

6. Your selected document and page number appear in the **Paste Pages** dialog box. To change your selection, enter the appropriate document and page number.
7. By default, the pages will be pasted directly before your selected location. If you want them pasted after your destination page, select the option, **Paste after destination page.**

> **Tip**:
>
> Select the **Suppress future copy/paste Pages messages** options to hide the confirmation messages in the future. To show the message once again, select **Tools > Options > Confirmation Messages**, and select the applicable check box.

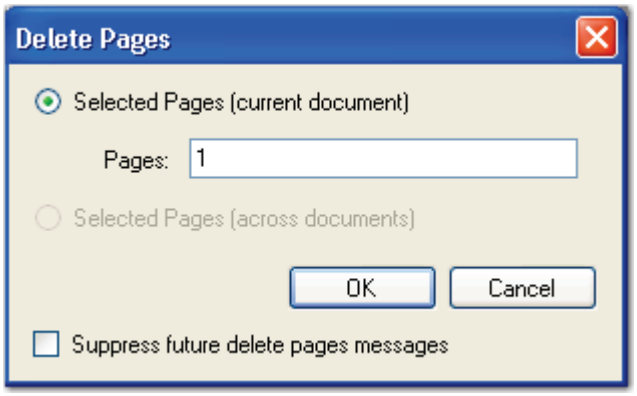
Deleting Pages

This operation deletes your specified page(s) in one document or across multiple documents. You can perform this operation in single display view (**View > Organization > Single Display**) or multiple display view (**View > Organization > Multiple Display**) as well as the Thumbnails window (**View > Windows > Thumbnails**).

> **Tip**:
>
> You can also right-click on a page or within the multiple display view or Thumbnails window to delete pages.

To delete pages:

1. Select one or more pages in the same document or across multiple documents.
2. Click the **Delete Pages** icon. The **Delete Pages** dialog box appears.



Delete Pages

5. If you selected pages within the same document, the first option, **Selected pages (current document)**, is selected. For this option, the selected pages are listed in the **Pages** field. If you selected pages across multiple documents, the second option, **Selected pages (across documents)**, would be selected. Ensure the appropriate option is selected, and then click **OK**.
6. To confirm the deletion, click **OK**.

> **Tip**:
>
> Select the **Suppress future delete pages message** option to hide the confirmation message in the future. To show the message once again, select **Tools > Options > Confirmation Messages**, and select the applicable check box.

Re-Saving a Page

If you rotate a page or invert its polarity, this command allows you to save its new appearance.

To re-save the page:

1. After you change the page rotation or polarity, click the **Re-Save Page** icon.
2. Click **OK** to the confirmation prompt.

Extracting and Copying Regions

This command extracts the specified region of an image and copies it to the next page of the document.

To extract and copy a region:

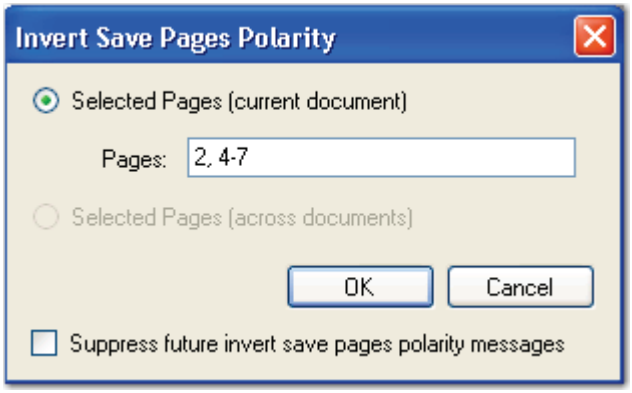
1. Navigate to the image in the page.
2. Press the **Shift** key and click the left mouse button.
3. While holding the mouse button, drag the cursor around the region. A yellow boundary appears around the region.
4. Select **Edit > Extract and Copy Region**.
5. Click **Yes** to create a new page with the extracted region. The new page appears after the current page.

Inverting and Saving Page Polarity

Inverting the page polarity reverses the black text on white background to white text on black background (or vice versa). This operation saves the inverted pages prior to batch submittal.

To invert and save page polarity on one or multiple pages:

1. Select one or more pages.
2. Click the **Invert Save Pages** icon. The **Invert Save Pages Polarity** dialog box appears.



Invert Save Pages Polarity

3. If you selected pages within the same document, the first option, **Selected pages (current document)**, is selected. For this option, the selected pages are listed in the **Pages** field. If you selected pages across multiple documents, the second option, **Selected pages (across documents)**, is selected. Ensure the appropriate option is selected.
4. To specify a certain page, page range, or combination thereof, enter the page numbers in the **Pages** field. For example, you can enter "2, 4-7."
5. Click **OK**.

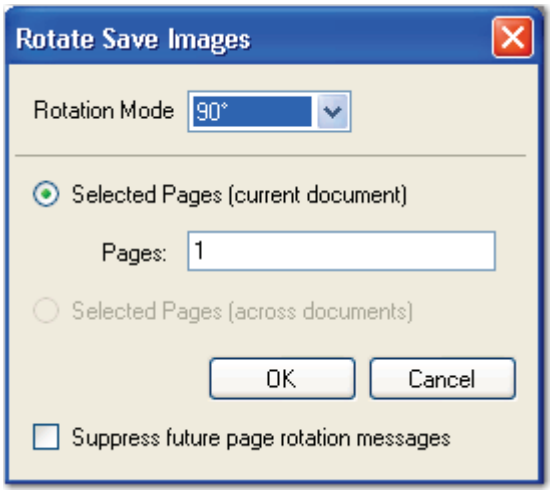
> **Tip**:
>
> To prevent this confirmation message from appearing each time you perform this operation, select the **Suppress future invert page polarity messages** option. To show the message once again, select **Tools > Options > Confirmation Messages**, and select the applicable check box.

Rotating and Saving Images

You can rotate one or multiple images in one document or across multiple documents and save them. You can perform this operation in the Thumbnails window (**View > Windows > Thumbnails**), single display view (**View > Organization > Single View**) or multiple display view (**View > Organization > Multiple Display**).

To rotate and save one or multiple images:

1. Select one or more pages.
2. Click the **Rotate and Save Images** icon. The **Rotate and Save Images** dialog box appears.



Rotate Save Images

3. From the **Rotation Mode** drop-down list, select the angle (90, 180, 270).
4. If you selected pages within the same document, the first option, **Selected pages (current document)**, will be selected. For this option, the selected pages are listed in the **Pages** field. If you selected pages across multiple documents, the second option, **Selected pages (across documents)**, is selected. Ensure the appropriate option is selected.
5. To specify a certain page, page range, or combination thereof, enter the page numbers in the **Pages** field. For example, you can enter "2, 4-7."
6. Click **OK**.

> **Tip**:
>
> To prevent this confirmation message from appearing each time you perform this operation, select the **Suppress future page rotation messages** option. To show the message once again, select **Tools > Options > Confirmation Messages**, and select the applicable check box.

Executing Custom Code

This command is available if your administrator provides a custom operation that you can execute from your job step. For example, an operation can validate your indexing entries against an external database, or your indexing entries can update an external database. Click the **Execute Custom Code** icon to run a custom operation.

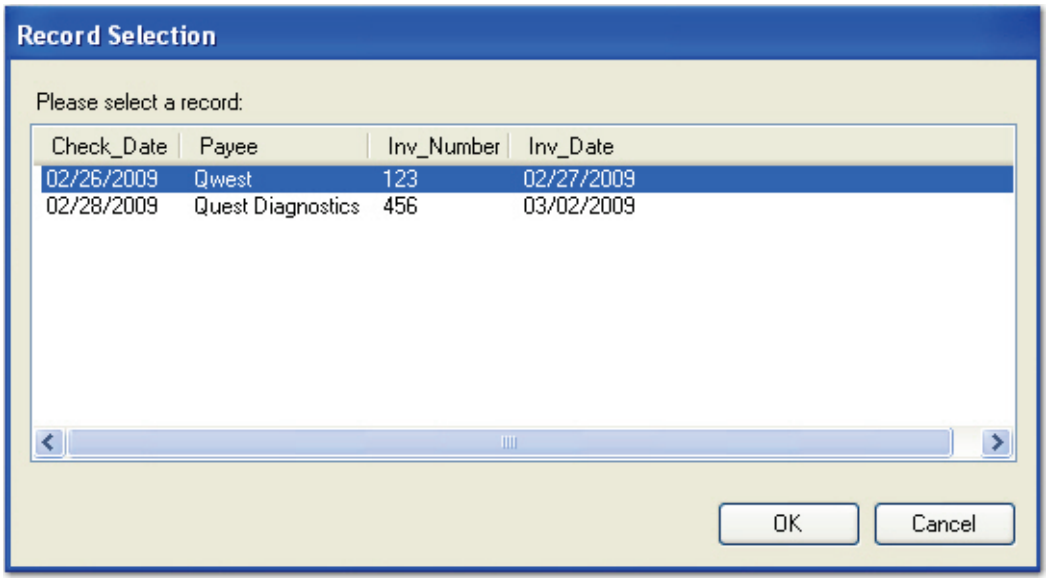
Merging Index Values

If this command is available, you can execute it to combine your indexing entries with entries found in the administrator's assigned database. For example, you enter one required index value, a social security number, for an insurance invoice. You execute the command, and the remaining two index fields, First Name and Last Name, are automatically filled in.

If you are unsure of the exact index value while hand-key indexing, you can insert wildcard characters to perform a partial search against the database. For example, you can insert the percent sign (%) to specify any number of unknown characters to search for in a SQL, Sybase, or Oracle database; or, you can insert the asterisk (*) to specify any number of unknown characters to search for within a Microsoft Access database. For information on performing specific wildcard searches against a database, refer to the respective database's documentation.

To merge your index values:

1. Enter the required index value(s).
2. Click the **Merge Index Values** icon. The entries found in the database populate the remaining index fields.
3. If more than one entry is found, you will be presented with a list of records in the **Record Selection** dialog. Highlight the record and click **OK**.



Record Selection

Tip:

Click a column header to sort the records in ascending or descending order, and the sort order will be maintained for the duration of your logon session (i.e., the records return to their original sort order after you log out of the Operator Console).

4. If you do not see the correct record, click **Cancel**.

Merging Like Documents

If this command is available, you can execute it to combine multiple documents containing the same index values into a single document. Documents that have not been indexed are not included in the merge process. The Merge Like Documents command is performed on all documents in the batch.

To merge documents containing the same index values:

1. Enter the required index value(s) for all documents.
2. Select **Edit > Merge Like Documents**. If the **Browse Batch** window is viewable, documents with matching index values will be combined into one document.

> **Note:**
>
> Documents must contain matching index values in order to be merged. For example, in a batch containing three documents, one document contains a blank index value; the other two documents have a matching index value of 80111. Only the two documents with 80111 index values will be merged.

3. If you are merging a large volume of documents, a progress message will appear during document analysis, prior to the document merge. During analysis, you can click the **Cancel** button to cancel the merge process and return to the job step screen.

> **Note:**
>
> Depending on the number of documents that comprise the batch, document analysis may take a few minutes to complete.

4. Click **OK** to the confirmation message.

To undo a document merge:

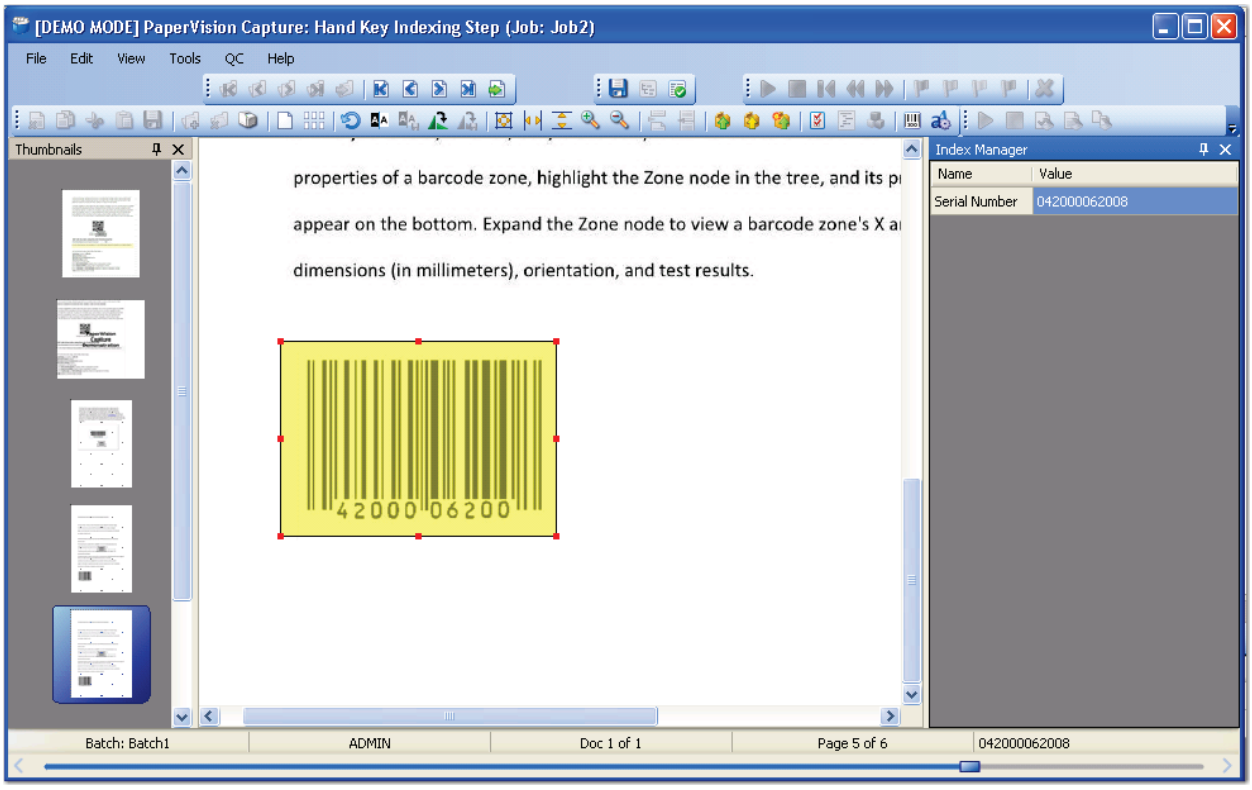
1. Before submitting the batch, close out of the job step.
2. In the batch creation screen, highlight the batch containing the merged documents in the **Batches Owned** list.
3. Click the **Undo Take** button to release the batch to the **Batches Waiting** queue. Documents in the batch will no longer be merged.

Manual Barcode Indexing

If you are tasked with indexing barcodes in the Capture or Indexing step, the Manual Barcode Index operation is available in the Standard toolbar and Edit menu. This operation allows you to manually apply zones around barcodes in order to extract data that populates index fields. This operation enables you to extract data from barcodes that may shift positions across pages and documents.

To manually barcode and index:

1. Select the appropriate index field in the **Index Manager**.
2. Press **Shift + left mouse button** to equip the cursor with a zone.
3. While pressing the **Shift key + left mouse button**, drag the cursor around the region on the image. Barcode zones appear highlighted in the main window.
4. Click the **Manual Barcode Index** icon. The index value read from the barcode zone appears in the **Index Manager**.



Manual Barcode Indexing (Indexing Step)

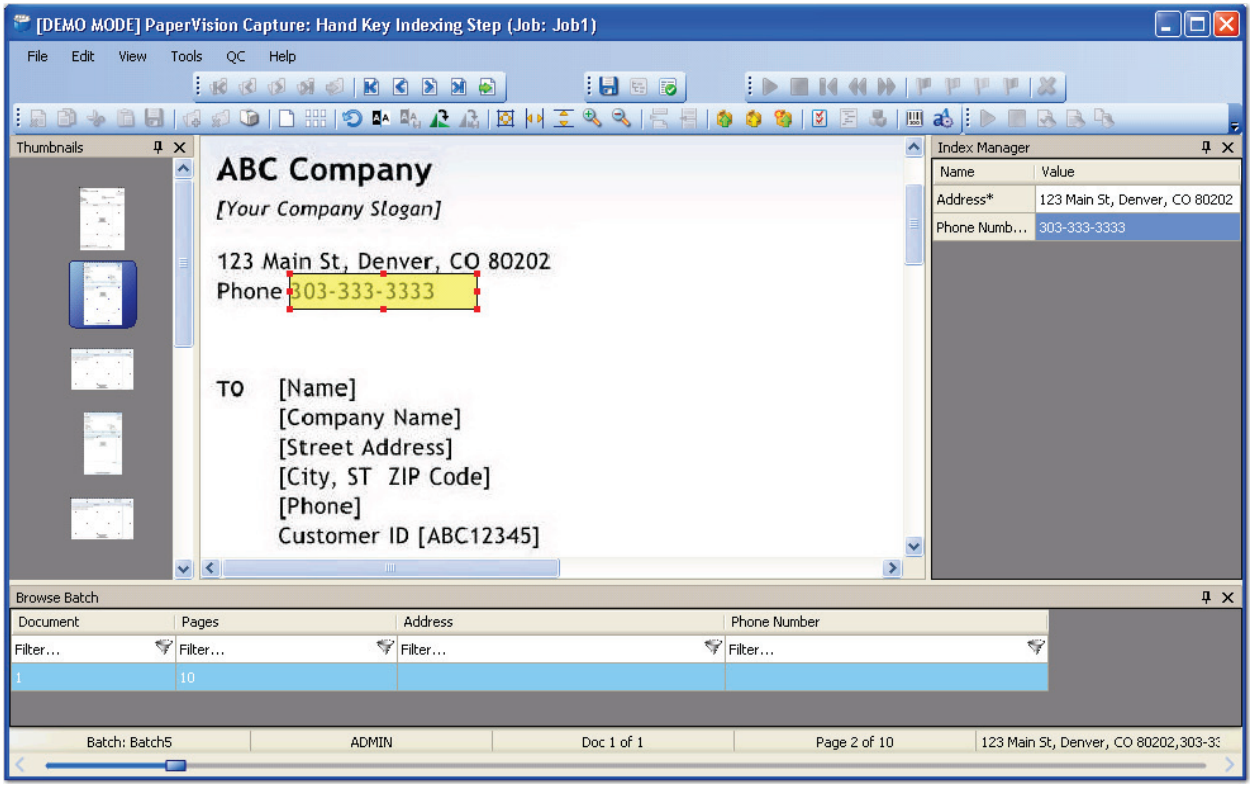
Manual OCR Indexing

If you are tasked with indexing OCR text in the Capture or Indexing step, the Manual OCR Index operation is available in the Standard toolbar and Edit menu. This operation allows you to draw zones around text in order to extract data that populates index fields. This operation enables you to extract text that may shift positions across pages and documents.

To manually OCR and index:

1. Select the appropriate index field in the **Index Manager**.
2. Press **Shift + left mouse button** to equip the cursor with a zone.
3. While pressing the **Shift + left mouse button**, drag the cursor around the region on the image. OCR zones appear highlighted in the main window.
4. Click the **Manual OCR Index** icon. The index value read from the OCR zone appears in the **Index Manager**.

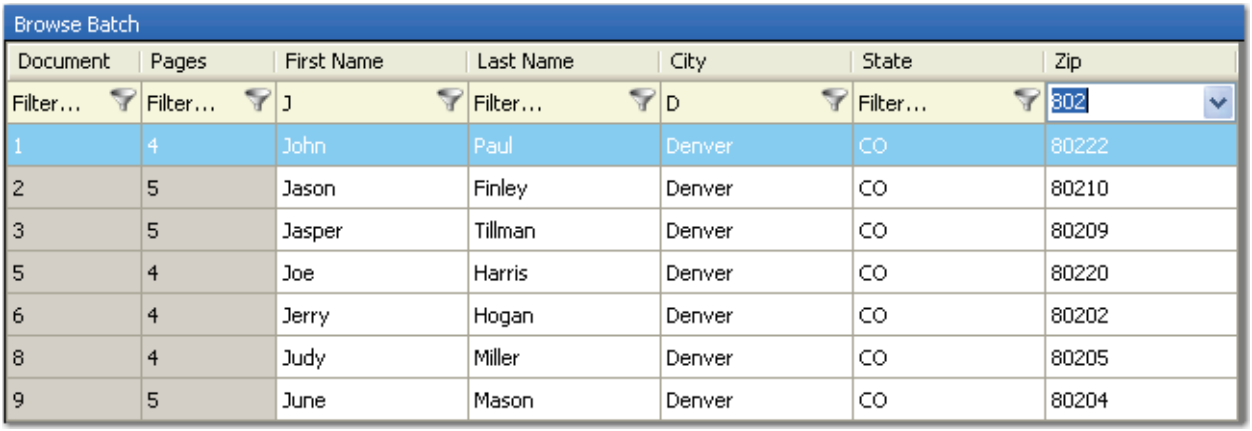
> **Tip**:
>
> If the barcode or text was not read completely or the results seem inaccurate, adjust the zone's borders or scan a clearer image into the Operator Console.



Manual OCR Indexing (Indexing Step)

Browse Batch Filter

You can use the Browse Batch Filter to locate documents containing specific index values (or, blank index values), document numbers, and page counts. As you type characters in any of the top **Filter** fields, only those documents containing your specified criteria will appear in the Browse Batch window.



Browse Batch Filter

To filter the Browse Batch grid by index values:

1. In the top **Filter** field for the appropriate index field name, enter one or more characters to initiate the filter.
2. Alternatively, select the **<Blank>** option to filter by documents containing blank index values.
3. Press **Enter** or the **Up** and **Down** arrows to locate the document.

To filter the Browse Batch grid by document number:

1. In the top **Filter** field in the **Document** column, enter one or more numbers (indicating the document position within the batch) to initiate the filter.
2. Or, enter the entire number.
3. Press **Enter** or the **Up** and **Down** arrows to locate the document.

To filter the Browse Batch grid by page counts:

1. In the top **Filter** field in the **Pages** column, enter one or more numbers (indicating the number of pages comprising the document) to initiate the filter.
2. Or, enter the entire number.
3. Press **Enter** or the **Up** and **Down** arrows to locate the document.

> **Tip**:
>
> To clear all filter criteria and start over, press **Shift+Ctrl+F**, or right-click within the Browse Batch window, and select **Clear Filters** from the context menu.

View Menu

The View menu helps you organize and customize your workspace when you work in the PaperVision Capture Operator Console. Page and document navigation commands in this menu are also found in the Batch Navigation toolbar.

> **Tip**:
>
> Many of the View menu commands are accessible if you right-click in the main viewing window in single- or multiple-display view.

Resetting an Image

This command sets the image rotation back to its original view and displays the image using the Scale to Window view. To reset the image to its original view, click the **Reset** icon.

Rotating an Image

This command rotates the page view by 90 degrees clockwise. Click the **Rotate** icon.

> **Note**:
>
> If you save the image, the saved image will be rotated.

Inverting Page Polarity

Inverting the page polarity reverses the black text on white background to white text on black background (or vice versa). When you are in single-display view, you can click the **Invert Page Polarity** icon to run this operation.

Scaling an Image

These commands fit images to the height, width, or both height and width of the screen.

- Click the **Scale to Height** icon to scale the image to the height of the main window.
- Click the **Scale to Width** icon to scale the image to the width of the main window.
- Click the **Scale to Window** icon to scale the image to fit the entire image in the main window.

Navigating Documents

The Documents menu contains the document navigation commands also found in the Batch Navigation toolbar.

Batch Navigation Commands (Documents)	
First Document	Displays the first document **Hot Key**: Ctrl+Home
Previous Document	Displays the previous document **Hot Key**: Ctrl+Page Up
Next Document	Displays the next document **Hot Key**: Ctrl+Page Down
Last Document	Displays the last document **Hot Key**: Ctrl+End
Jump To Document	Retrieves a specified document based on its sequence in the batch **Hot Key:** Ctrl+J

Navigating Pages

The Page menu option contains the page navigation commands also found in the Batch Navigation toolbar.

Batch Navigation Commands (Pages)	
First Page	Displays the first page of the current document **Hot Key**: Home
Previous Page	Displays the previous page of the current document **Hot Key**: Page Up
Next Page	Displays the next page of the current document **Hot Key**: Page Down
Last Page	Displays the last page of the current document **Hot Key**: End
Jump To Page	Retrieves your specified page number **Hot Key:** J

Viewing Windows

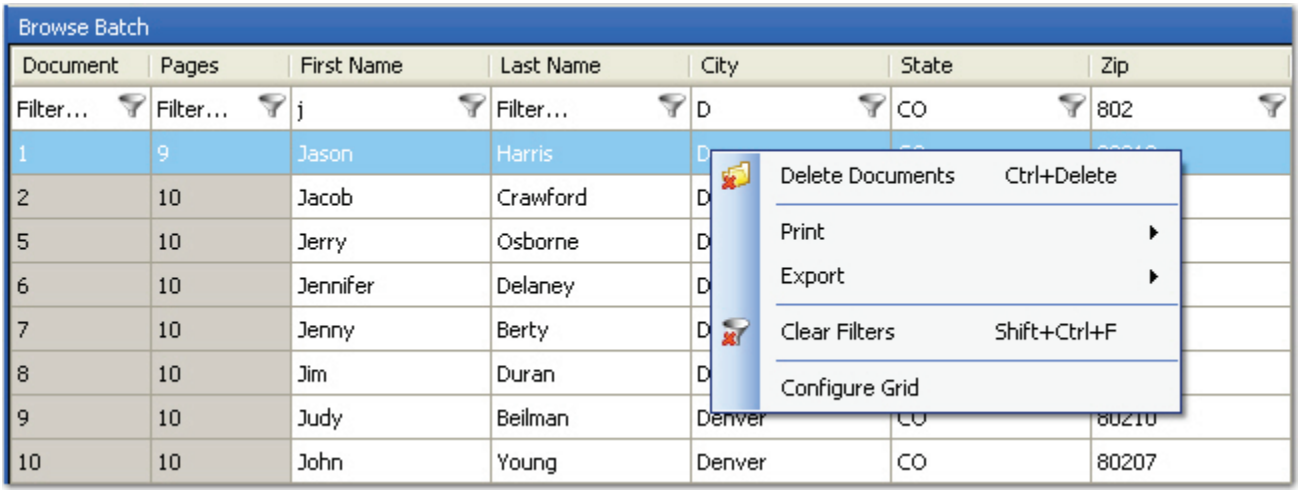
In the View menu, the Windows submenu allows you to display thumbnail views, Browse Batch window, Index Manager, and QC windows.

- To show thumbnail previews of documents, select **View > Windows > Thumbnails**.
- To show the Browse Batch window, select **View > Windows > Browse Batch**.
- To show the Index Manager, select **View > Windows > Index Manager**.
- To show the Browse QC Tags grid, select **View > Windows > Browse QC Tags.**
- To show the QC Tag Details window, select **View > Windows > QC Tag Details.**

> **Note**:
>
> Your PaperVision Capture administrator grants you permission to see the Browse Batch window and assigns you to hand-key index, so these options may be unavailable.

Right-Clicking in the Browse Batch Window

If your administrator has granted you access to view the Browse Batch window, you can right-click within the window to execute operations on the batch. First, you can delete one or more documents and associated images from the batch. You can also print and export one or more documents' metadata to an XML file, such as index values, batch name/order, and number of pages. The Browse Batch Filter can help you locate documents by document position number, number of pages comprising the document, or specific index values. Additionally, you can reorder and hide columns within the grid with the Configure Grid operation.



Browse Batch Grid (Right-Click Menu)

> **Note:**
> The print and export operations do not print or export associated images.

To delete one or more documents:

1. Highlight one or more documents.
2. Right-click and select **Delete Documents**.
3. To proceed with the deletion, click **Yes**.

To print one or more documents:

1. Highlight one or more documents.
2. Right-click and select **Print > Selected Rows**.
3. Or, select **Print > All Rows**.
4. Select the printing parameters and click **OK**.

To export one or more documents' metadata:

1. Highlight one or more documents.
2. Right-click and select **Export > Selected Rows**.
3. Or, select **Export > All Rows.**
4. In the **Save As** dialog box, browse to the appropriate directory where the XML file will be saved.
5. Enter the file name.
6. Click **Save**.

To clear all Browse Batch Filter criteria, right-click and select **Clear Filters**.

> **Note**:
> For more information, see the section on the **Browse Batch Filter.**

To reorder the columns:

1. Right-click in the **Browse Batch** grid, and then select **Configure Grid**.

   > **Note**:
   > If no indexes have been defined, the Configure Grid operation will be disabled.

2. In the Show/Hide Columns dialog box, highlight the column to move, and then select **Move Up** or **Move Down**.

   > **Note**:
   > You cannot hide the Document and Pages columns.

3. To restore the columns to their original order, click **Reset**.

To show or hide columns:

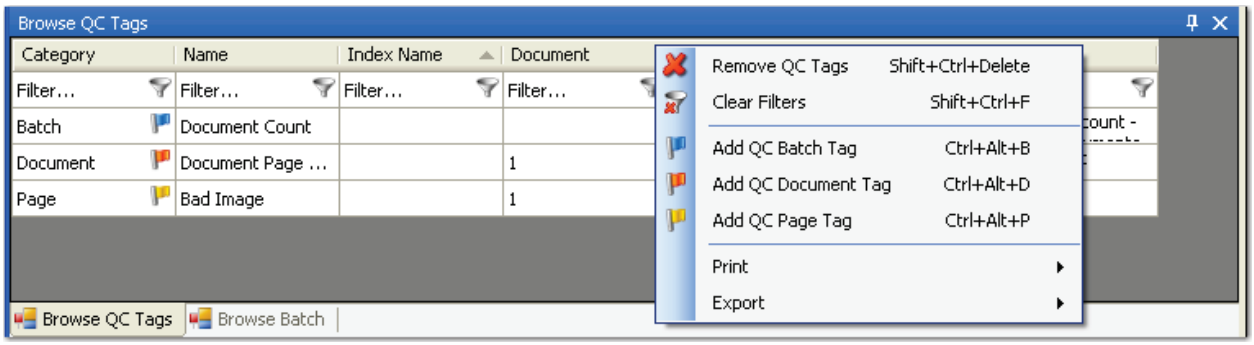
1. Right-click in the **Browse Batch** grid, and then select **Configure Grid**.
2. In the Show/Hide Columns dialog box, select the columns to display in the Browse Batch grid.

   > **Note**:
   > You cannot hide the Document and Pages columns.

3. To restore the original columns that will be displayed in the grid, click **Reset**.

Right-Clicking in the Browse QC Tags Window

If your administrator has granted you access to view the Browse QC Tags window (**View > Windows > Browse QC Tags**), you can right-click within the window to execute operations on existing QC tags. First, you can remove one or multiple QC tags from the batch. You can also print and export one or multiple QC tags' metadata to an XML file. The Browse QC Tags Filter can help you locate documents by document position number, number of pages comprising the document, specific index values, and other criteria.



Browse QC Tags (Right-Click Context Menu)

> **Note:**
> The print and export operations do not print or export associated images.

To remove all QC tags:

1. Highlight one or more documents containing QC tags.
2. Right-click and select **Remove QC Tags**.
3. To proceed with the deletion, click **Yes**.

To clear all Browse Batch Filter criteria, right-click and select **Clear Filters**.

To add a QC Batch Tag:

1. Right-click and select **Add QC Batch Tag** from the context menu.
2. In the **QC Tag Details** window, select the tag name.
3. Enter additional information about the tag (optional).
4. Click **Apply**.

To add a QC Document Tag:

1. Right-click and select **Add QC Document Tag** from the context menu.
2. In the **QC Tag Details** window, select the tag name.
3. Enter additional information about the tag (optional).
4. Click **Apply**.

To add a QC Page Tag:

1. Right-click and select **Add QC Page Tag** from the context menu.
2. In the **QC Tag Details** window, select the tag name.
3. Enter additional information about the tag (optional).
4. Click **Apply**.

To print one or more QC tags' metadata:

1. Highlight one or more QC tags.
2. Right-click and select **Print > Selected Rows**.
3. Or, select **Print > All Rows**.
4. Select the printing parameters, and then click **OK**.

To export one or more QC tags' metadata:

1. Highlight one or more QC tags.
2. Right-click and select **Export > Selected Rows**.
3. Or, select **Export > All Rows.**
4. In the **Save As** dialog box, browse to the appropriate directory where the XML file will be saved.
5. Enter the file name.
6. Click **Save**.

Single- and Multiple-Display Organization

The Organization menu options allow you to choose a single-page display or multiple-page display for documents in the main viewing window.

- To view one page at a time in the main window, select **View > Organization > Single Display**.
- To view multiple pages in the main window, select View > Organization > Multiple Display. To assign the number of rows and columns that appear at a time, see the section on **Display Preferences** in Chapter 7.

> **Note**:
>
> Windows that you open or close in single-display and multiple-display views, such as Thumbnails, Index Manager, and Browse Batch, etc., are retained in each view (per job step) when you switch between them.

Dragging and Dropping Pages in Multiple Display View

When you are in multiple-display or Thumbnails view, can drag and drop consecutive or non-consecutive pages within the same document or across documents. Multiple, non-consecutive pages that you select (in the same document or across multiple documents) will appear in sequential order in the destination location.

To drag and drop one or more pages:

1. Select one or more pages.
2. Hold the mouse button, and then drag the pages to the new location in the batch. You can drag the pages to a location in the same document or across documents. For guidance, your selected pages appear translucent as you move them, and a vertical line appears in the destination location.
3. To quickly scroll through the Thumbnails or multiple display view, drag the selected images over the right or left (up or down) arrows.
4. When you have reached the desired location, release the mouse button.

Toolbars

To display the PaperVision Capture Operator Console toolbars, open the **View** menu and ensure check marks appear next to the appropriate toolbars:

- Standard
- Scanning
- Batch Navigation
- Indexing

Status Bar

The Status Bar displays the batch name, user, scanner status, document number, and page number at the bottom of the screen. To display the Status Bar at the bottom of the screen, select **View > Status Bar**, and select the check box.

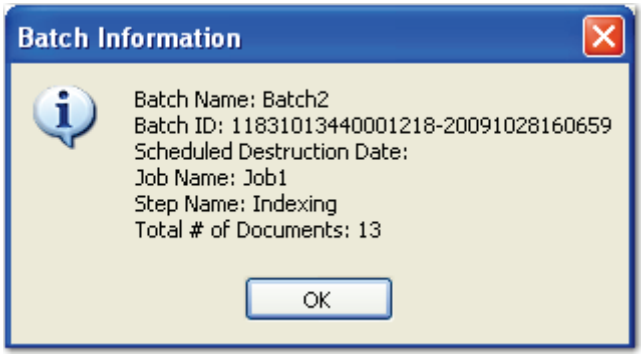
Batch Scrollbar

The Batch Scrollbar displays the selected image's position relative to the batch. To display the Status Bar at the bottom of the screen, select **View > Batch Scrollbar** , and select the check box.

Tools Menu

The Tools menu contains user settings for the Capture Operator Console.

- Select **Tools > Options** to access the PaperVision Capture Operator Console Settings. For more information, see the chapter on **Operator Console Settings.**
- Select **Tools > Batch Information** to display the batch name/ID, destruction date, job and step names, and number of documents comprising the batch.



Batch Information

- Select **Tools > Image Information** to display the image name, its dimensions, size, and current document name.

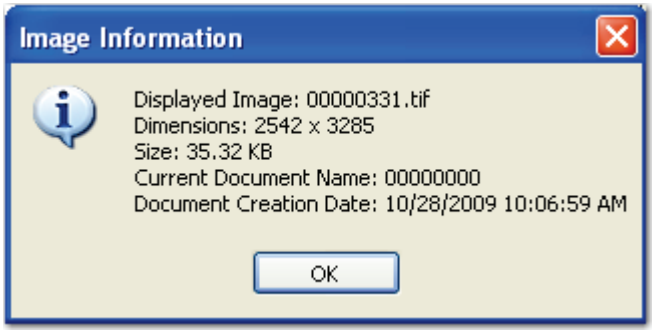
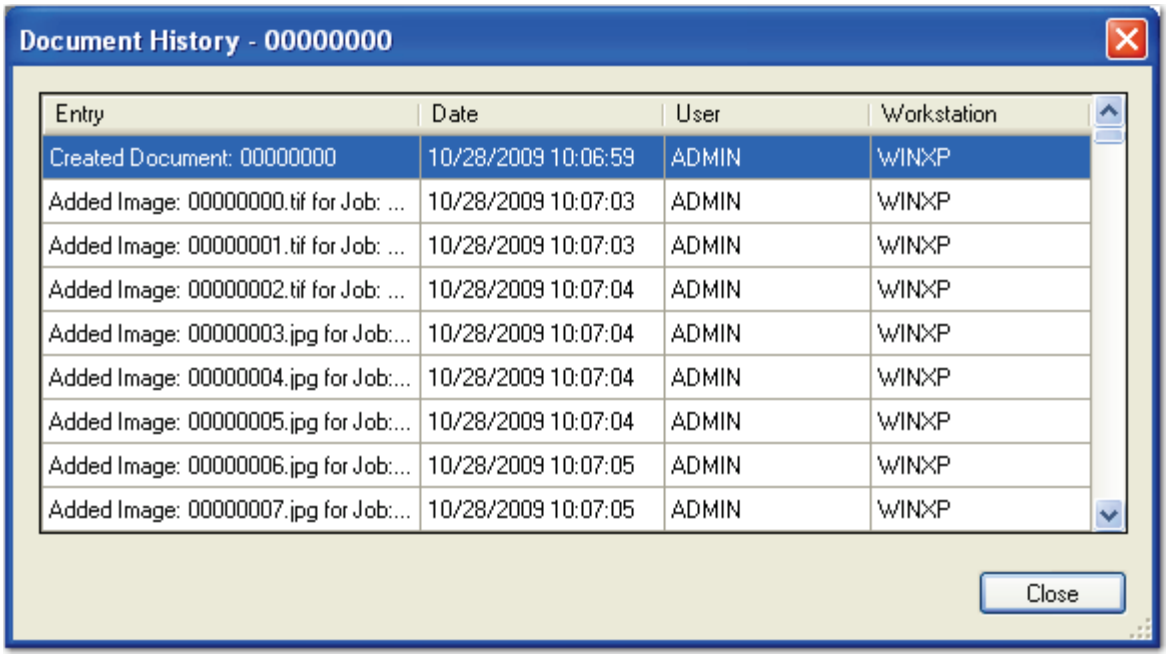


Image Information

- Select **Tools > Document History** to view all user actions performed on the document, such as its creation date and name, image additions and deletions, and index additions and updates.

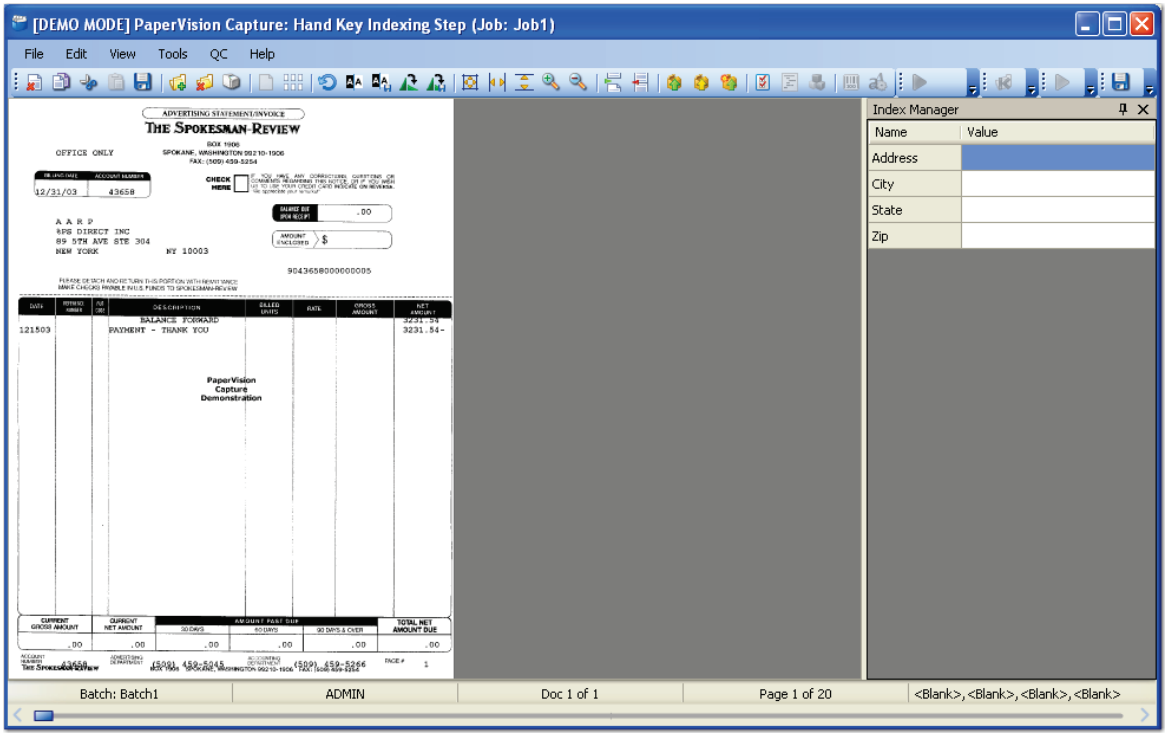


Document History

Chapter 4 – Capture Step

If you are assigned to the Capture job step by your administrator, the **Capture Step** screen appears after you take and open a batch from the **Batches Owned** list in the batch creation screen. The Capture Step screen allows you to customize PaperVision Capture for the scanning needs for any task. Once you successfully scan and import batches and images, you can manipulate documents and pages and submit batches from this screen. If you are tasked with hand-key indexing while you scan, you can open the Index Manager window, which is accessible by selecting **View > Windows > Index Manager**.

If you are tasked with reviewing documents, pages, or index values while you hand-key index, auto play operations (in the View menu) enable you to progress through the documents and pages. You can use the QC tagging operations (in the Edit menu) to tag batches, documents, pages, or individual index values for further review. For more information on PaperVision Capture's QC operations, see the Chapter 6 on **Manual QC**.



Capture Step

File Menu

In addition to the described in the section on the **File Menu**

in Chapter 3, the Import Batch command is also available in the Capture step.

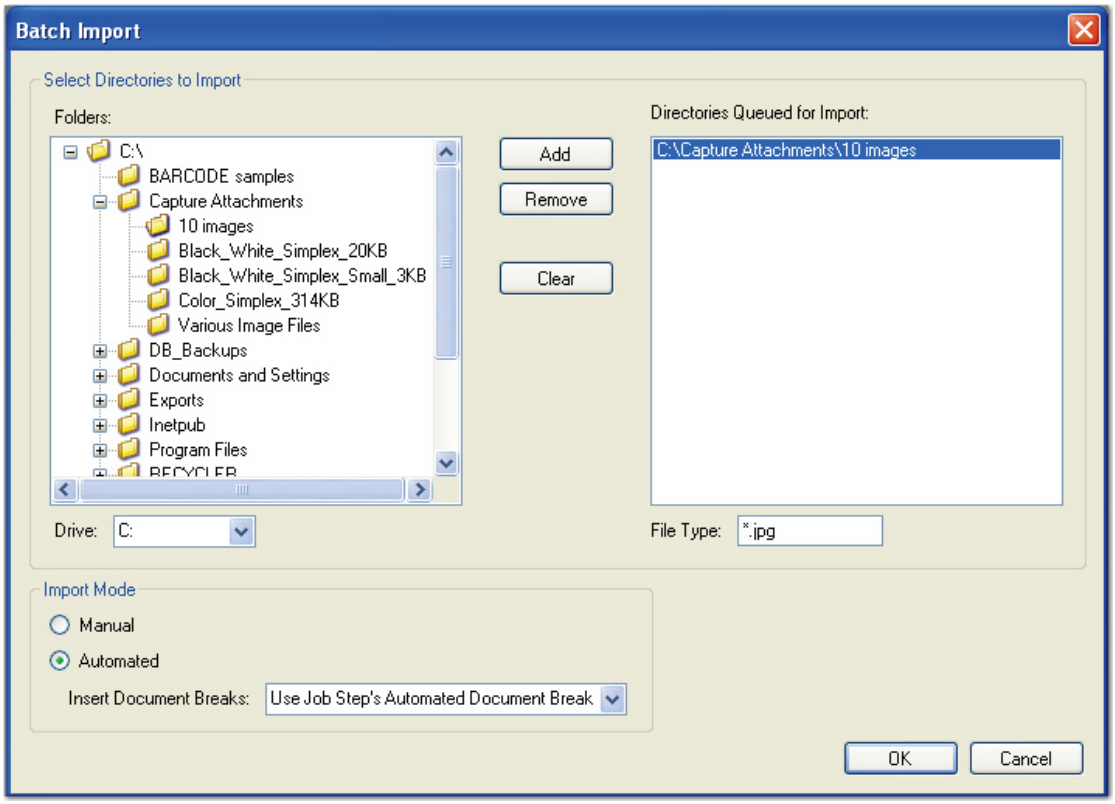
Importing Batches

The Import Batch command allows you to manually or automatically import directories containing images. This command creates a new document at the end of the current batch and then inserts the images. Additionally, Import Batch allows new documents to be created through barcoding or one of the following options:

- The **Manual** option prompts you to keep or discard documents and pages that are being added to the batch. This option also enables you to manipulate the images as you import them.
- The **Automated** option allows you to insert document breaks with each directory or image file, or based on the job step's automated document break setting assigned by the administrator.

To import a batch:

1. Select **File** > **Import Batch**, and the **Batch Import** dialog box opens.



Batch Import

2. In the **Select Directories to Import** section, highlight the directory and click **Add.**
3. Repeat the second step for each target directory.

> **Note:**
>
> A message appears if you attempt to import a directory that has already been added to the Directories Queued for Import list.

4. If applicable, select the drive from which to import the batch. By default, the contents of your local hard drive appear in the **Folders** list.
5. To remove one or more directories, highlight them in the **Directories Queued for Import** list, and then click **Remove.**

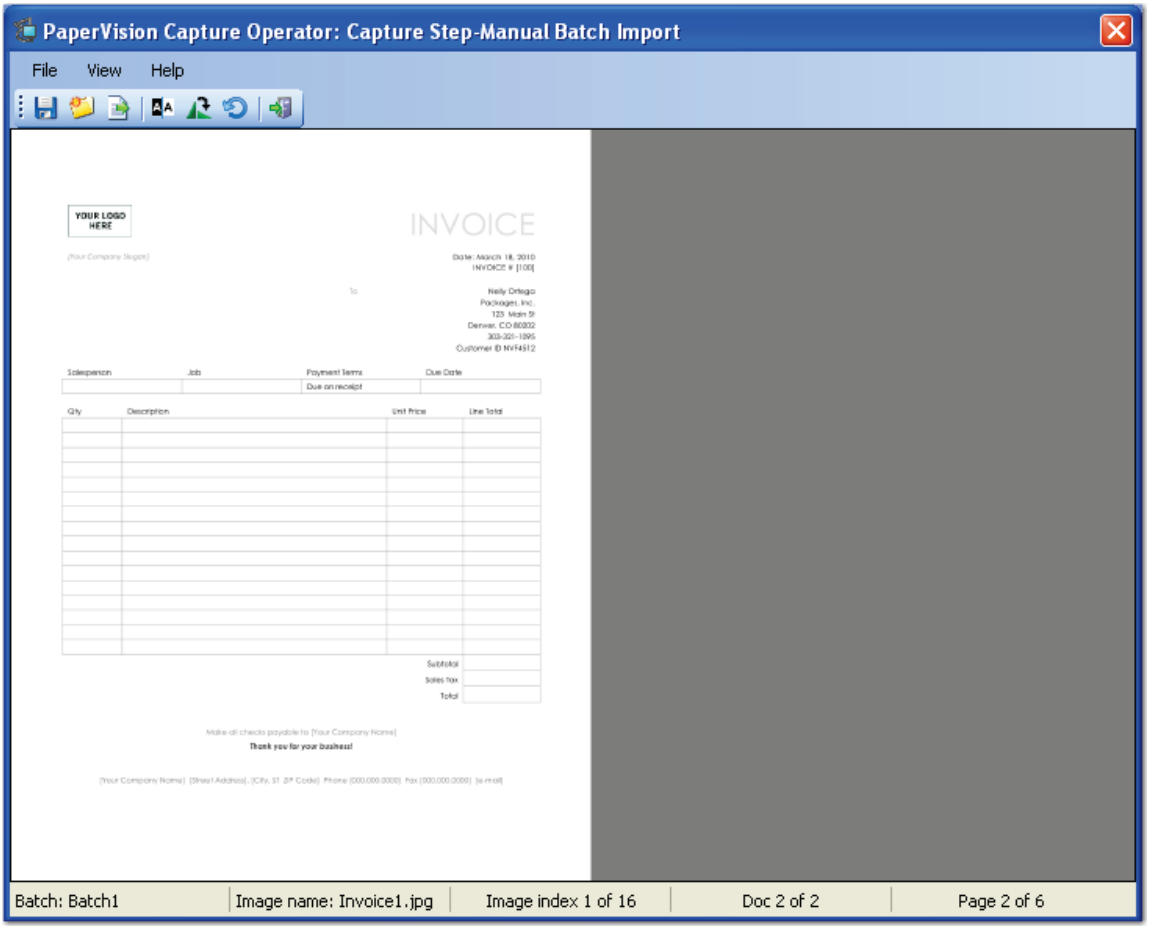
> **Note:**
>
> Use the **Ctrl** key when you select multiple directories or the **Shift** key when you select multiple, consecutive directories.

6. To remove all selected directories, click **Clear.**
7. To specify an image file type to import, enter it in the **File Type** field.
8. To enter multiple image file types, use the filter format with semicolons placed between file types:

```
*.bmp; *.jpg; *.tif
```

9. In the **Import Mode** section, if you select **Manual**, proceed to the next step**.** If you select **Automated,** proceed to step 11.

10. If you select the **Manual** option, the **Manual Batch Import** screen opens where you can save or skip certain images and insert document breaks. Additionally, you can rotate the pages, invert page polarity, and reset the page view. The progress bar at the bottom of the screen helps you navigate through the images by displaying batch, image, document, and page information.



Manual Batch Import

- To save the image, click the **Save Image** icon.
- To create a new document and save the image, click the **Create New Document and Save Image** icon.
- To skip the image, click the **Skip Image** icon.
- To invert the page polarity, click the **Invert** icon.
- To rotate the page view by 90 degrees clockwise, click the **Rotate** icon.
- To reset the image to its original view, click the **Reset** icon.
- To exit out of the screen, click the **Exit** icon.

The following hot keys can be used in the **Manual Batch Import** screen:

- **Save Image** (Ctrl+S)
- **Create New Document and Save Image** (Ctrl+Insert)
- **Skip Image** (Ctrl+I)
- **Invert Page Polarity** (Ctrl+N)
- **Rotate Image** (R)
- **Reset Image** (Spacebar or Ctrl+T)
- **Exit** (Ctrl+E)
- **Help** (F1)

11. If you select the **Automated** batch import option, select from the following **Insert Document Break** options:
    - **Use Job Step's Auto-Document Break Setting** is assigned by your administrator. One of the three settings may have been assigned:
        a. **None:** This is the default auto-document break type for a newly created step. When set to **None**, the system expects you to manually separate new documents.
        b. **Number of Pages Per Document:** This is the total number of pages that PaperVision Capture will scan before starting a new document. Your administrator may have the system display a message that asks you for a fixed number of pages before breaking to a new document.
        c. **Barcode**: Your administrator has defined the barcode zones to be read for document breaks during the scanning process.
    - **Each Directory** automatically imports images into multiple documents, placing a document break between each directory. For example, if you select a parent directory that contains subdirectories, document breaks are automatically inserted between the subdirectories.
    - **Each Image** automatically places a document break between each image file. Multi-page image files are also separated into their constituent parts during the import process.
12. Click **OK** to begin the import process.
13. A notification may appear if the import process encounters an invalid image and will prompt you whether to import the remaining images.
    - Click **Yes** to import the remaining images into the batch.
    - Click **No** to abort the import process from that image forward. The remaining images (located after the invalid image) will not be imported.

Scanner Menu

The Scanner menu and toolbar, specific to the Capture step, contain commands that enable you to scan specific pages and documents, mark new documents and scan, configure scanner settings, and insert pages into documents.

Scanner Menu and Toolbar Commands	
Mark New Document and Scan	Creates a new document and begins scanning pages in the new document **Hot Key**: M
Scan Pages	Scans from a specified page to the end of the current document **Hot Key**: S **Note**: A notification will appear if you attempt to scan pages when the feeder does not contain paper.
Scan One Page	Scans a specified page (If your scanner is configured for duplex scanning, only the front image is scanned) **Hot Key**: O
Re-Scan Pages	Re-scans a specified range of pages **Hot Key**: A
Insert Pages	Inserts pages before or after a specified page and applies page rotation (if defined by the administrator); does not apply barcode recognition or auto document breaks **Hot Keys**: Ctrl+B (Before); Ctrl+A (After)
Stop Scanner	Stops the scanner **Hot Key**: Escape
Scanner Settings	Allows you to configure your scanner's settings **Hot Key**: E
Saved Scanner Settings	Drop-down menu that contains saved scanner settings and allows you to toggle among multiple scanner configurations on-the-fly **Hot Key**: Ctrl+F6

Marking New Documents and Scanning

In the Capture step, you can create new documents and scan pages into the newly-created document by executing the Mark New Document and Scan command. To execute this operation, click the **Mark New Document and Scan** icon.

Edit Menu

For information on the standard Edit menu commands, see the section on the **Edit Menu** in Chapter 3.

View Menu

For information on the View menu commands, see the section on the **View Menu** in Chapter 3. If you are assigned to the Capture step, the Organization submenu allows you to choose a single-page display or multiple-page display for documents.

- To view one page at a time in the main window, select **View > Organization > Single Display**.
- To view multiple pages in the main window, select **View > Organization > Multiple Display**. To assign the number of rows and columns that appear at a time, see the section on **Display Preferences in Chapter 7**.

> **Note**:
>
> Windows that you open or close in single-display and multiple-display views, such as Thumbnails, Index Manager, and Browse Batch, etc., are retained in each view when you switch between them.

Indexing in the Capture Step

If you are tasked with hand-key indexing while you scan, the Index Manager allows you to enter the required index values. Your administrator may have assigned additional requirements while you hand-key index values. For example, you may be restricted to select only from a pre-defined drop-down list of index values. Or, you may be required to enter only valid index values (e.g. a date in a Birth Date field, a number in a Social Security field, etc.). Within this movable and resizable window, you can also add detail sets (if your administrator has provided this operation) to the existing index values. See the section on **Adding Detail Sets** in Chapter 5 for more information.

To hand-key index values in the Capture step:

1. In the Capture step screen, select **View > Windows > Index Manager**. The **Index Manager** window appears.

Index Manager

2. Enter the required index values for each document in the batch.
3. Unsaved index values will appear with an asterisk (*) next to the field name. When you are finished entering the required index values, you can press **Enter** to save the index values (or, press the **Save Indexes** icon) prior to submitting the batch.

> **Tip**:
>
> To receive a message that notifies you when all documents have been indexed in the Capture or Indexing step, enable the general display preference option, **Save and Jump to Next Document with Blank Index Values.**

4. Submit the batch.
5. If you have not yet saved index values, you will be prompted to save them. If the prompt appears, select **Yes**.
6. Optionally, you can verify index values prior to submitting the batch.

> **Note**:
>
> For more information on saving and verifying index values, see the sections on **Saving Indexes** on **page 68** and **Verifying Index Values** on **page 69**.

Tools Menu

The Tools menu contains the PaperVision Capture Operator Console's user settings, batch/image information, and document history operations. For information on the Tools menu commands, see the section on the **Tools Menu** in Chapter 3.

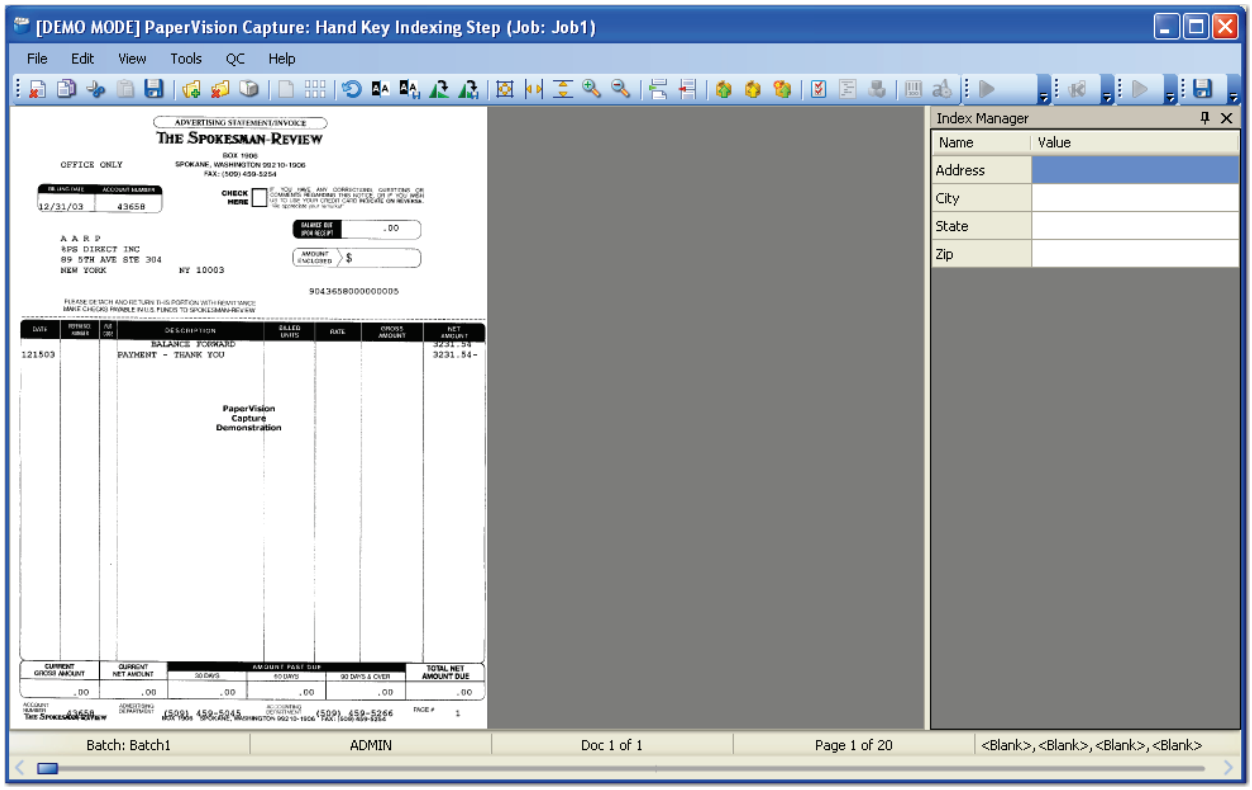
QC Menu

QC Auto play and QC tagging operations are available in the QC menu when your administrator requires you to inspect and tag batches, documents, pages, and index fields while you scan in the Operator Console. The QC menu and toolbar contain auto play operations that enable you to automatically advance through batches, documents, and pages to perform visual inspections. Auto play operations facilitate your visual inspection since you do not have to touch the keyboard or mouse to move between pages, documents, and batches. The QC menu and toolbar also contain the tagging operations so you can apply batch, document, page, and index tags as necessary. For information on PaperVision Capture's QC operations, see the next chapter on **Manual QC**.

Chapter 5 – Indexing Step

If you are assigned to the Indexing job step by your administrator, the **Indexing Step** screen appears after you take and open a batch from the **Batches Owned** list in the batch creation screen. The Indexing Step screen allows you to save, verify, and merge index values. You can also add detail set values while indexing within this screen.

If you are tasked with document manipulation operations (such as adding, copying, and deleting documents; inserting and removing document breaks, etc.) while you hand-key index values, these operations will be available in the Edit menu and enabled in the Standard toolbar. If you are tasked with tagging index values for further review while you hand-key index, the QC menu and toolbar enable you to use the auto play and tagging operations. For more information on PaperVision Capture's QC operations, see **Chapter 6 – Manual QC**.



Indexing Step

File Menu

In addition to the standard commands described in the section on the **File Menu** in Chapter 3, the Add Detail Set, Save Indexes, and Verify Index Values commands are available for the Indexing step.

Adding Detail Sets

If your PaperVision Capture Administrator has defined detail sets for the job to which you are assigned, you can insert detail set values in the Index Manager. In PaperVision Capture, detail sets define a collection of indexes that allow multiple sets of field data to reference a single document. Detail sets are defined by your PaperVision Capture administrator.

For example, in an accounts payable job, index fields may be set up for check number, check date, payee, invoice number, and invoice date. If you set up all of these fields as index fields, a single document may be represented as follows:

Check Number	Check Date	Payee	Invoice Number	Invoice Date
12345	08/19/2008	ABC Corp	A0001	08/01/2008
12345	08/19/2008	ABC Corp	A0002	08/02/2008
12345	08/19/2008	ABC Corp	A0003	08/03/2008

The first three index fields (Check Number, Check Date, and Payee) will be duplicated per changing invoice number. Rather than duplicating the information in the first three fields, you can represent the first three fields as index fields and assign the remaining two fields, Invoice Number and Invoice Date, as detail sets.

Index Fields

Check Number	Check Date	Payee	Document ID *
12345	08/19/2008	ABC Corp	654

* The system Document ID is generated behind the scenes, hidden from your view.

Detail Sets

Invoice Number	Invoice Date	Document ID *
A0001	08/01/2008	654
A0002	08/02/2008	654
A0003	08/03/2008	654

To add detail set values:

1. Click the **Add Detail Set** icon.
2. Enter the number of detail sets.
3. Click **OK**.

Saving Indexes

After you enter your index values, you can save them prior to submitting the batch. Unsaved index values display with an asterisk (*) next to the index field name. If you have not entered a required field (or entered an invalid index value) in the Index Manage upon saving the index value, a red exclamation icon will appear in the field.

> **Tip**:
>
> To receive a message that notifies you when all documents have been indexed in the Capture or Indexing step, enable the general display preference option, **Save and Jump to Next Document with Blank Index Values.**

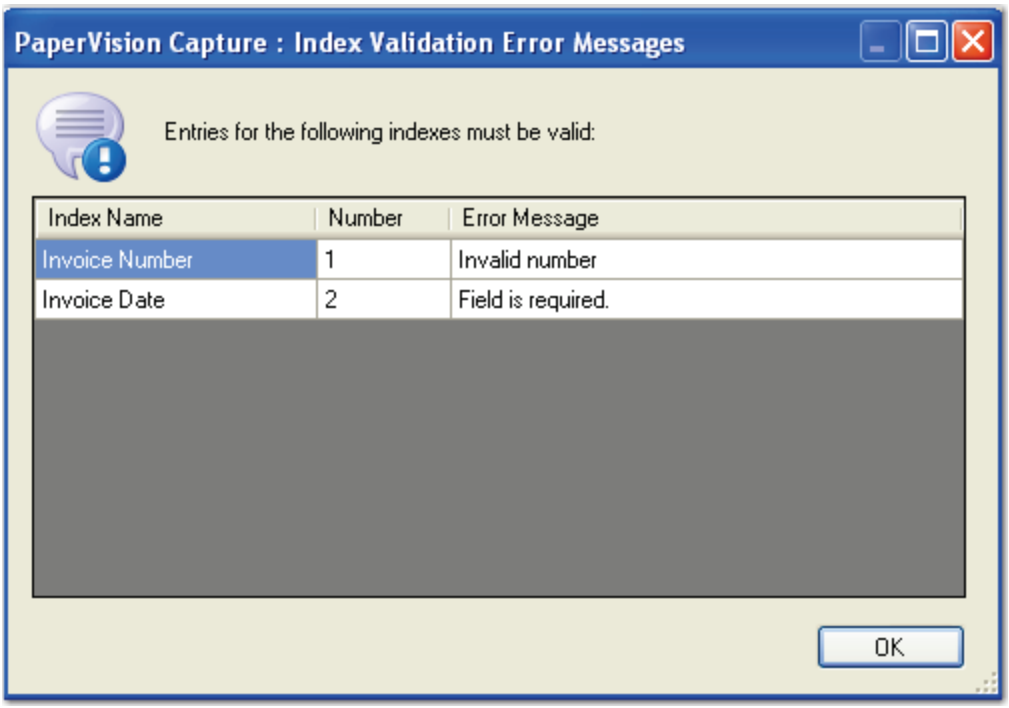
To save index values:

1. Click the **Save Indexes** icon.

   > **Tip:**
   >
   > You can also press **Enter** in the Index Manager.

2. If indexing errors occurred, they appear in a popup message. Click **OK** to return to the Index Manager to correct the errors before proceeding.

   > **Note:**
   >
   > If your Browse Batch window is viewable, the index values will be updated once you execute the Save Indexes command.



Index Validation Error Messages

Verifying Index Values

To ensure the accuracy of hand-key indexing, the Verify Index Values command searches for blank values or other search string values (defined by the administrator) in the current batch. Depending on your general index verification settings in **Tools > Display Preferences** (**Verify Starts from Current Document Forward** or **Verify Starts at the Beginning of the Batch**), the index verification process starts with the appropriate document in the batch and will highlight the next document that contains a blank value or the administrator's defined search string value. To verify that blank index values or other defined search string values are not present, click the **Verify Index Values** icon. If no blank values or defined search string values exist, you will see a message that indicates all indexes have been verified.

Edit Menu

For information on the Edit menu commands, see the section on the **Edit Menu** in Chapter 3. The Merge Index Values command may be available if your administrator has provided a custom merge operation that you can execute from your job step. Additionally, if you are tasked with manually applying zones around barcodes or OCR text in the Indexing step, the Manual Barcode Index and Manual OCR Index operations may be available. See the sections on **Manual Barcode Indexing** and **Manual OCR Indexing** in Chapter 3.

View Menu

For information on the View menu commands, see the section on the **View Menu** in Chapter 3.

- To view one page at a time in the main window, select **View > Organization > Single Display**.
- To view multiple pages in the main window, select **View > Organization > Multiple Display**. To assign the number of rows and columns that appear at a time, see the section on **Display Preferences** in Chapter 7.

Tools Menu

The Tools menu contains the PaperVision Capture Operator Console's user settings, batch/image information, and document history operations. For information on the Tools menu commands, see the section on the **Tools Menu** in Chapter 3.

QC Menu

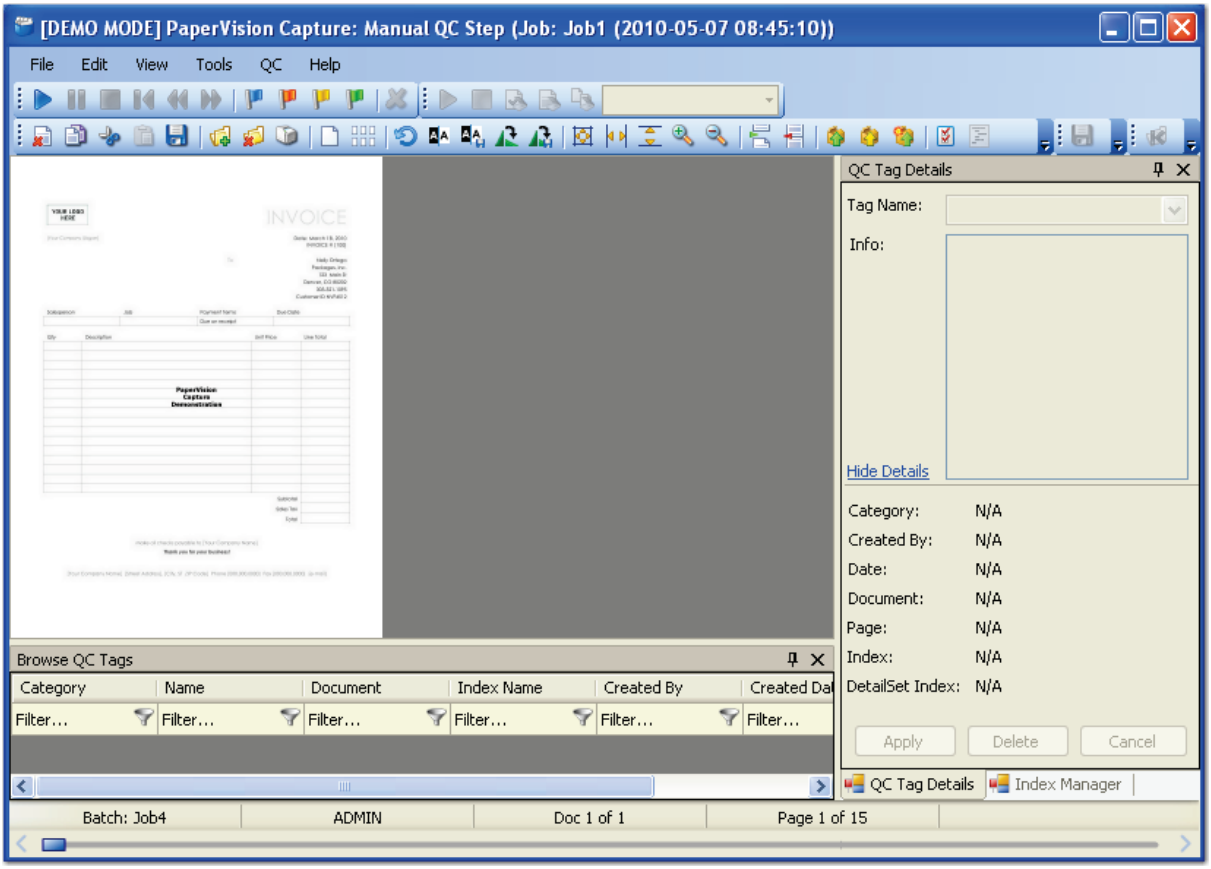
QC Auto play and QC tagging operations are available in the QC menu when your administrator requires you to inspect and tag batches, documents, pages, and index fields while indexing in the Operator Console. The QC menu and toolbar contain auto play operations that enable you to automatically advance through batches, documents, and pages to perform visual inspections. Auto play operations facilitate your visual inspection since you do not have to touch the keyboard or mouse to move between pages, documents, and batches. The QC menu and toolbar also contain the tagging operations so you can apply batch, document, page, and index tags as necessary. For information on PaperVision Capture's QC operations, see the next chapter on **Manual QC**.

Chapter 6 – Manual Quality Control (QC) Step

If you are assigned to the Manual QC step by your administrator, you can visually inspect batches, documents, pages, and index fields to ensure these items do not require further processing or review. Within this step, you can automatically advance through documents and pages, manipulate documents and pages, and tag items that need to be re-scanned, re-indexed, etc. For example, you can apply a document-level tag that indicates an entire document needs to be re-scanned; in that same document, you can apply a page-level tag that indicates a page falls outside a specified file size range. Depending on your viewing preferences, you can perform manual QC operations in single or multiple display view.

Within the Manual QC step, the QC toolbar and QC menu contain the QC auto play and tagging operations. Most of these operations include corresponding hot keys that are described in this chapter. Each tag is color-coded to facilitate faster visual inspection, and they appear in hierarchical order from left to right (batch, document, page, index) in the QC toolbar.

Your administrator determines what tag names are available for selection and whether you can tag items while scanning or hand-key indexing. By default, the Browse QC Tags window appears at the bottom of the screen, and the QC Tag Details window appears to the right of the main viewing window, where you can view and add details on each tag.



Manual QC Step

File Menu

For information on the operations available within this menu, see the section on the **File Menu**

in Chapter 3.

Edit Menu

For information on the standard Edit menu operations, see the section on the **Edit Menu** in Chapter 3.

View Menu

For information on the View menu operations, see the section on the **View Menu** in Chapter 3.

- To view one page at a time in the main window, select **View > Organization > Single Display**.
- To view multiple pages in the main window, select **View > Organization > Multiple Display**. To assign the number of rows and columns that appear at a time, see the section on **Display Preferences** in Chapter 7.

Viewing Images

You can change how many images display at a time (single or multiple display) in the main window while you work in the Manual QC step. Additionally, you can adjust how each image appears within the main viewing window. The Invert and Save Page Polarity and Rotate and Save Images operations allow you to save inverted and rotated images prior to submitting the batch.

The following viewing operations are available for images:

- Single Display
- Multiple Display
- Reset Image
- Invert Page Polarity
- Invert and Save Page Polarity
- Rotate Image
- Rotate and Save Images
- Scale to Window
- Scale to Width
- Scale to Height
- Zoom In
- Zoom Out

Page and Document Navigation

You can navigate through pages and documents in the Manual QC step. For descriptions of each operation, see the sections on **Navigating Documents** and **Navigating Pages** in Chapter 3.

> **Note**:
>
> When you initially perform a page or document navigation operation during auto play, you will be prompted to first exit out of QC auto play mode. You can opt to suppress this confirmation message in the future.

The following page and document navigation operations are available:

- First Document
- Previous Document
- Next Document
- Last Document
- First Page
- Previous Page
- Jump to Page

Page and Document Manipulation

If you are required to add or delete documents, cut/copy/paste pages, insert document breaks, etc. in the Manual QC step, you can use the Standard toolbar to perform these operations. Alternatively, you can right-click within a document or page and select the operation from the context menu. For descriptions of each operation, see the section on the **Standard toolbar** in Chapter 3.

> **Note**:
>
> When you initially perform a page or document manipulation operation during auto play, you will be prompted to first exit out of QC auto play mode. You can opt to suppress this confirmation message in the future.

The following page and document manipulation operations are available:

- Delete Pages
- Copy Pages
- Cut Pages
- Paste Pages
- Re-Save Page
- Add Document
- Delete Document
- Print Document

QC Menu Operations

The QC menu and toolbar contain the auto play operations that enable you to automatically advance through batches, documents, and pages to perform visual inspections. Auto play operations facilitate your visual inspection since you do not have to touch the keyboard or mouse to move between pages, documents, and batches. The QC menu and toolbar also contain the tagging operations so you can apply batch, document, page, and index tags as necessary. Auto play and tagging operations are only available in the Manual QC step or when your administrator requires you to inspect and tag items while scanning or indexing in the Operator Console.

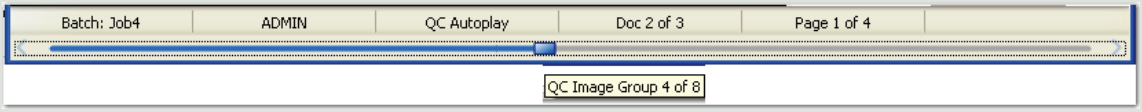
Once you start QC auto play, each page (single display view) or thumbnail view of pages (multiple display view) automatically appears for a certain number of seconds. Your administrator determines how many pages and/or documents are skipped during auto play and how long each page or group of pages appear on screen at a time. Each auto play operation is accessible via the QC menu, QC toolbar, or hot key combination. During auto play, you can zoom in/zoom out on images, invert page polarity, rotate images, and scale images (to width, height, and window).

QC Toolbar

QC Auto Play Operations	
Start QC Auto Play	Starts the auto play operation **Hot Key**: Ctrl+Alt+Q
Pause QC Auto Play	Pauses the auto play operation **Hot Key**: Ctrl+Alt+W
Exit QC Auto Play	Exits out of auto play mode **Hot Key**: Ctrl+Alt+E
Restart QC Auto Play	Returns to the first page of the first QC group of images (or single image) **Hot Key**: Ctrl+Alt+S
Previous QC Group	Returns to the previously-viewed group of images (or single image) **Hot Key**: Ctrl+Alt+R
Next QC Group	Progresses to the next group of images (or single image) **Hot Key:** Ctrl+Alt+N

Tip:

When in QC Auto Play, you can move between groups of images with the Batch scrollbar at the bottom of the screen. In addition, when you place the cursor over the slider, you can see which image group is currently being viewed.



Batch Scrollbar

Using the QC Auto Play Operations

To begin auto play, click the **Start QC Auto Play** icon, and each image or group of images appear in the main viewing window for an allotted amount of time. When you encounter an image that falls outside of specified size range, image that needs to be re-scanned, etc., click the **Pause QC Auto Play** button to temporarily stop auto play and apply the appropriate QC tag. To restart auto play from the beginning, click the **Restart QC Auto Play** icon. To return to a previously-viewed image or group of images, click the **Previous QC Group** icon. To advance to the next image or group of images, click the **Next QC Group** icon. To exit out of auto play, click the **Exit QC Auto Play** icon.

Tip:

When you initially exit QC Auto Play, you are presented with a confirmation message. Select the **Suppress future QC auto play messages** option to hide the confirmation messages in the future. To show the message once again, select **Tools > Options > Confirmation Messages,** and select the applicable check box.

QC Tags

During the inspection of batches, documents, pages, and indexes, you can pause QC auto play to apply QC tags via the QC toolbar. Alternatively, you can right-click within a single page, the Thumbnails window, or Browse QC Tags window, and then select the appropriate tag from the context menu. When you apply a QC tag, you can modify the contents of the QC Tag Details window, where you select the tag name and enter additional details about each tag. You can apply QC tags in single- or multiple-display organizational view within the Manual QC, Capture, and Indexing steps.

QC Tags	
Add QC Batch Tag	Adds a QC Batch Tag **Hot Key**: Ctrl+Alt+B
Add QC Document Tag	Adds a QC Document Tag **Hot Key**: Ctrl+Alt+D
Add QC Page Tag	Adds a QC Page Tag **Hot Key**: Ctrl+Alt+P
Add QC Index Tag	Adds a QC Index Tag **Hot Key**: Ctrl+Alt+I
Remove QC Tag	Removes QC Tag **Hot Key**: Shift+Ctrl+Delete

Applying Batch Tags

Although the following predefined batch tags are available for selection, your administrator may have defined additional custom tags.

- **Document Count**: Indicates that the document count falls outside the specified range
- **Index Sequence**: Indicates that one or more numeric index values fall outside the specified minimum and maximum values

To apply a batch tag:

1. When you encounter a batch-level error during QC auto play, click the **Pause QC Auto Play** icon.
2. Click the **Add Batch Tag** icon.
3. In the **QC Tag Details** window, select the **Tag Name** from the drop-down list.
4. Enter additional information about the tag (optional).
5. Click **Apply** to save the tag.

Applying Document Tags

Although the following predefined document tags are available for selection, your administrator may have defined additional custom tags.

- **Document Page Count**: Indicates that a document page count falls outside the specified range
- **Document Re-Scan**: Indicates that a document needs to be re-scanned

To apply a document tag:

1. When you encounter a document-level error during QC auto play, click the **Pause QC Auto Play** icon.
2. Click the **Add Document Tag** icon.
3. In the **QC Tag Details** window, select the **Tag Name** from the drop-down list.
4. Enter additional information about the tag (optional).
5. Click **Apply** to save the tag.

Applying Page Tags

Although the following predefined page tags are available for selection, your administrator may have defined additional custom tags.

- **Bad Image**: Indicates that an image cannot be opened
- **Bad Image Path**: Indicates that an image cannot be located
- **Image Dimensions**: Indicates that an image falls outside the specified height and width parameters
- **Image File Size**: Indicates that an image size falls outside the specified range
- **Page Re-Scan**: Indicates that the page needs to be re-scanned

To apply a page tag:

1. When you encounter a page-level error during QC auto play, click the **Pause QC Auto Play** icon.
2. Click the **Add Page Tag** icon.
3. In the **QC Tag Details** window, select the **Tag Name** from the drop-down list.
4. Enter additional information about the tag (optional).
5. Click **Apply** to save the tag.

Applying Index Tags

Although the following predefined index tags are available for selection, your administrator may have defined additional custom tags.

- **Index Error**: Indicates that an indexing error exists
- **Re-Index**: Indicates that a specific index field needs to be indexed once again

To apply an index tag:

1. When you encounter an index-level error during QC auto play, click the **Pause QC Auto Play** icon.
2. Select the index field in the **Index Manager**.
3. Click the **Add Index Tag** icon.
4. In the **QC Tag Details** window, select the **Tag Name** from the drop-down list.
5. Enter additional information about the tag (optional).
6. Click **Apply** to save the tag.

Note:

If you attempt to modify an index value during QC Auto Play, you will first be prompted to exit QC Auto Play mode.

Removing a QC Tag

You can remove QC tags via the QC toolbar by right-clicking within the Browse QC Tags window. In the Browse QC Tags window, highlight the tag, and then click the **Remove QC Tag** icon (or, right-click and select **Remove QC Tag** from the context menu).

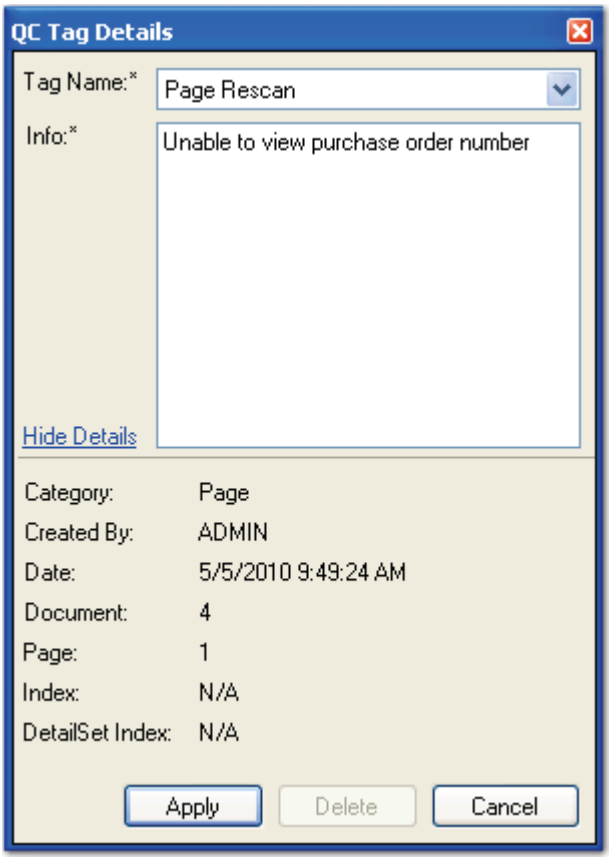
Tagging Documents, Pages, and Indexes in Multiple-Display View

In the multiple-display view, you can select multiple documents, pages, and index values and simultaneously tag these items for review.

1. In the main viewing window, select one or more documents, pages, or index values.
2. Click the **Add QC Document Tag**, **Add QC Page Tag** or **Add QC Index Tag** icon.
3. In the **QC Tag Details** window, select the **Tag Name** from the drop-down list.
4. Enter additional information about the tags (optional). Additional information is applied to all selected tags.
5. Click **Apply**.

QC Tag Details

Once you add a tag in the Manual QC step, the QC Tag Details window allows you to select its name and enter additional details about the tag. To view this window, select **View > Windows > QC Tag Details**.

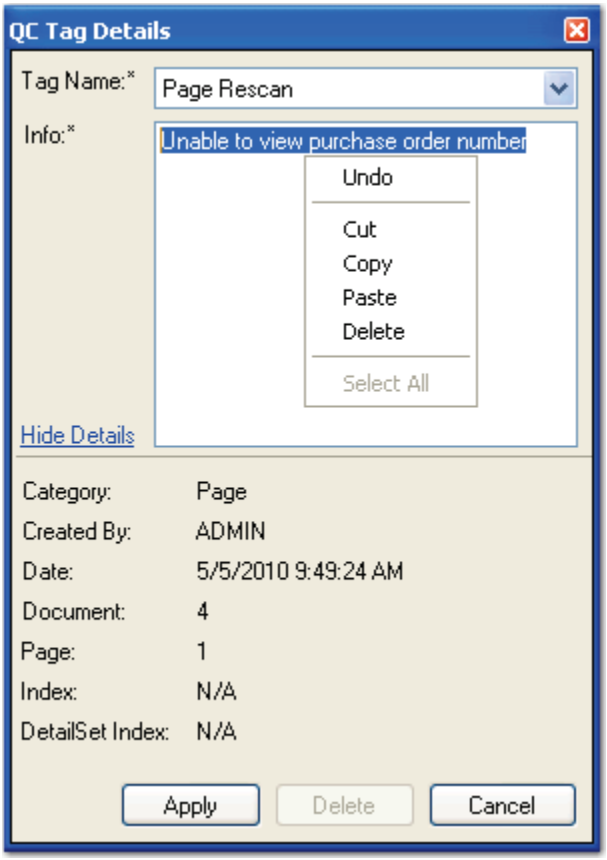


QC Tag Details

- **Tag Name** contains a list of tags available for selection.
- **Info** allows you to enter additional information (optional) about the tag.
- The **Category** displays the level (batch, document, page, index) at which the tag is applied.
- **Created By** indicates the user who added the tag.
- **Date** indicates the date/time the tag was applied.
- **Document**, if applicable, indicates the tag's document number.
- **Page**, if applicable, indicates the tag's page position within the document.
- **Index**, if applicable, indicates the tag's current index value.
- **Detail Set Index**, if applicable, indicates the tag's detail set value.

Right-Clicking on QC Tag Information

Within the QC Tag Details window, you can perform several right-click operations on the tag's information. You can copy/paste and cut/paste information from one tag to another, or you can undo or delete the information you have entered about the tag. Additionally, you can select all text to cut/paste or copy/paste into another tag, index, email, etc.



QC Tag Information Right-Click Menu

Chapter 7 – Operator Console Settings

Once you have opened a batch for your assigned job step, you can configure the scanner settings**,** display and system preferences, hot keys, and toolbars. To view the PaperVision Capture Operator Console settings, open **Tools > Options**.

- **Scanner Settings** allow you to customize scanner settings specific to individual workstations.
- **Indexing Preferences** allow you to customize hand-key indexing settings specific to individual workstations.
- **Display Preferences** define how single- and multiple-page documents display on-screen and how index verification is performed.
- **System Preferences** define document navigation, batch creation, and scanner event messages.
- **Import Preferences** allow you to select default PDF resolution and smoothing settings for import operations.
- **Confirmation Messages** allow you to display or suppress confirmation messages that appear during specific operations.
- **Hot Keys** allow you to personalize hot key settings.
- **Customize Toolbars** allow you to add new toolbars and customize existing toolbar settings.

Scanner Settings

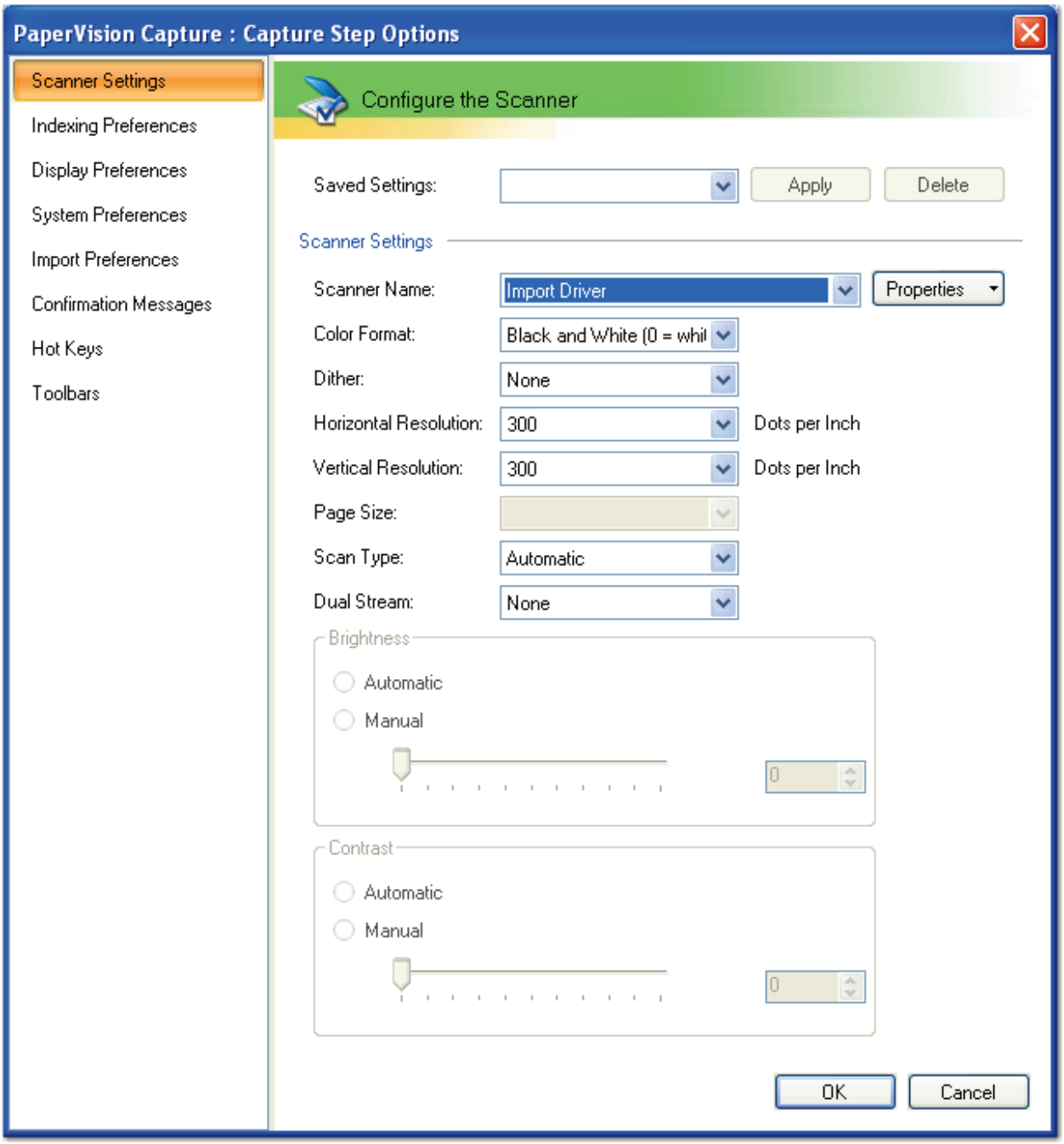
If you are assigned to the Capture step in the PaperVision Capture Operator Console, you can configure scanner settings for your workstation. Black and white images are saved in an industry standard Group IV TIFF file format, while color or grayscale images are saved in a standard JPG or BMP file format.

PaperVision Capture supports more than 300 ISIS-compatible scanners. The PaperVision Capture installation media contains most of the currently available ISIS scanner drivers. However, as this list is ever-growing, some newer drivers may not be available at the time of distribution. If you need additional drivers, please contact Digitech Systems' Technical Support at **support@digitechsystems.com** or by phone at (877)374-3569. If the driver is available, our support personnel will assist you in obtaining the driver.

PaperVision Capture also offers the ability to use TWAIN scanners. The use of TWAIN scanners is generally intended for extremely low-volume scanners as ISIS drivers are available for most scanners on the market.

Note:

Depending on the type of scanner that is used, some scanner options may be disabled, and the number of options available in the drop-down menus may vary.



Scanner Settings

Saved Settings

This drop-down menu displays scanner settings that were previously saved. To save a new scanner setting, enter the name directly in the **Saved Settings** field; then click **Apply.** To remove a setting, select it from the **Saved Settings** drop-down menu; then click **Delete.**

Scanner Name

Click the **Scanner Name** drop-down list to select a scanner that has been installed and detected by PaperVision Capture. The Properties menu allows you to configure scanner and file import devices. Depending on the type of scanner, the menu options will display different settings.

The Properties drop-down menu contains the following options:

- **More Settings** may contain additional scanner settings that are available for configuration.
- **About** displays the driver's version, copyright, and other information specific to the scanner.
- **Area Settings** allow you to assign the scanning area.
- **Extended Settings** may contain additional scanner settings that are available for configuration.
- **Calibrate** allows you to calibrate the scanner driver.
- **Configure** allows you to configure the scanner driver settings.

Color Format

Also known as the mode, you can select from options such as black and white, color, etc.

Dither

Dithering converts and simulates unavailable colors. When dithering is turned on, the system combines two or more colors to approximate the unavailable color.

Horizontal Resolution

Select the horizontal dots-per-inch resolution setting to apply during the scanning process.

Vertical Resolution

Select the vertical dots-per-inch resolution setting to apply during the scanning process.

Page Size

This setting determines the default page size of the image as it is scanned.

Scan Type

This setting determines if scanning should be two-sided (duplex), one-sided (simplex), etc.

Dual Stream

Applicable to dual stream scanners, you can select how pages will be scanned (Front/Back, Front Only, Back Only). To disable dual stream scanning, select **None**.

Brightness

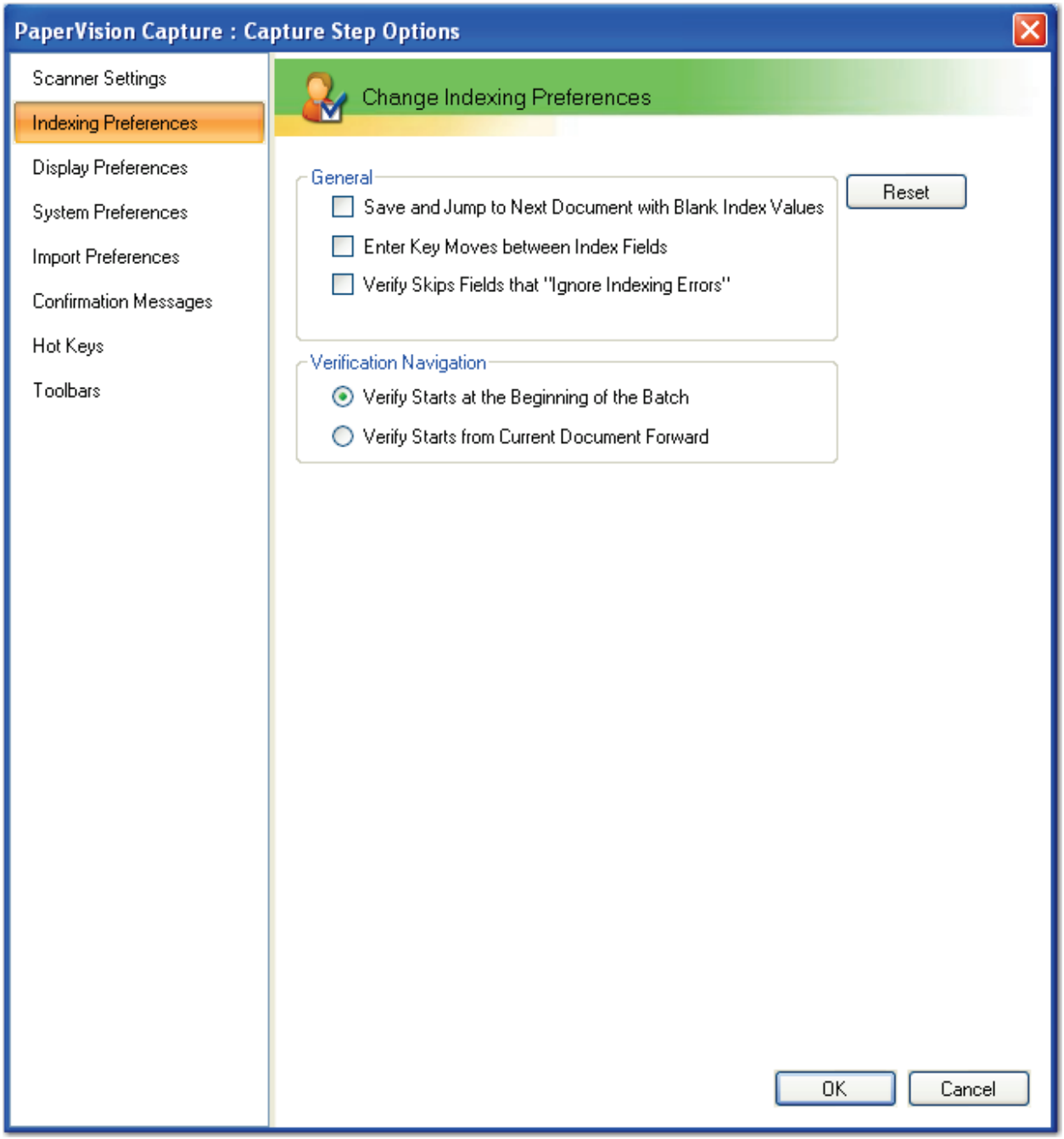
Brightness defines a pixel's lightness value from black (darkest) to white (brightest). Select the brightness level to apply during the scanning process and whether it should be applied manually or automatically. If applying the contrast manually, use the slider to increase or decrease the amount of contrast.

Contrast

Contrast is a measure of the rate of change of brightness in an image. A high-contrast image contains defined transitions from black to white. Select the contrast level to apply during the scanning process and whether it should be applied manually or automatically. If applying the contrast manually, use the slider to increase or decrease the amount of contrast.

Indexing Preferences

If you are assigned to the Indexing job step in PaperVision Capture, you can select how to progress between documents and index fields. These settings can also be configured if you are required to hand-key index in the Capture or Manual QC step. You can also determine where the index verification process begins in the batch.



Indexing Preferences

General

If you are tasked to enter index values, you can enable the following indexing settings:

- To save the current index values and proceed to the next document that contains blank index values, select **Save and Jump to Next Document with Blank Index Values.**
- To use the **Enter** key to move between index fields, select **Enter Key Moves Between Index Fields.**
- If you want the index verification process to skip fields that ignore an invalid index value, select **Verify Skips Fields that "Ignore Indexing Errors."**
- To start the index verification process at the beginning of a batch, select **Verify Starts at the Beginning of the Batch.**
- To start the index verification process from the current document forward, select **Verify Starts from Current Document Forward.**

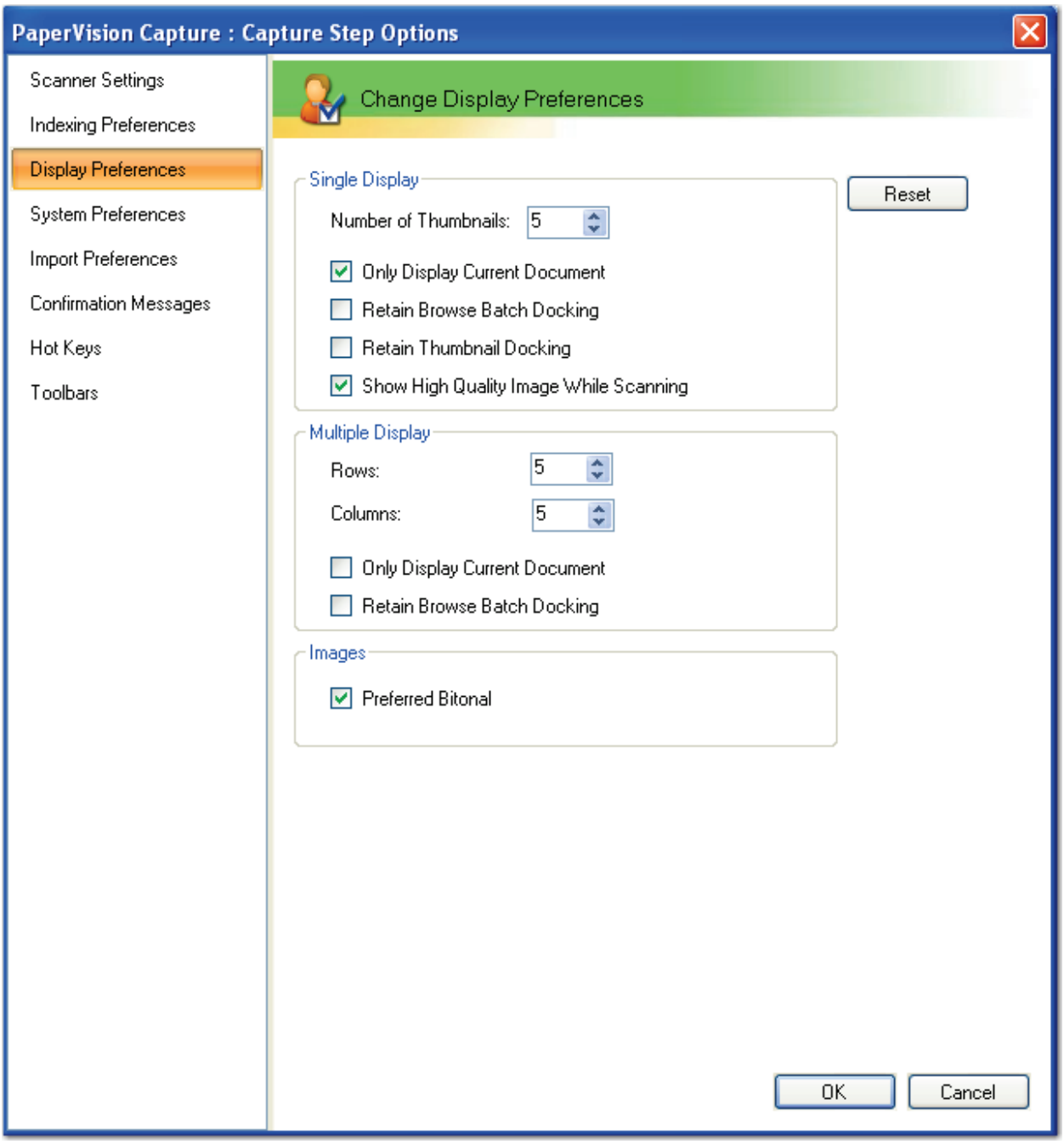
Verification Navigation

You can select the location in the batch where the index verification process begins.

- To start the index verification process at the beginning of a batch, select **Verify Starts at the Beginning of the Batch.**
- To start the index verification process from the current document forward, select **Verify Starts from Current Document Forward.**

Display Preferences

In the Display Preferences screen, you can manipulate the single- and multiple-page display options for all job steps. Additionally, you can customize the image display quality for thumbnail views.



Display Preferences – Capture Step

Single Display

If you view images in single display (**View > Organization > Single Display**), only one image appears at a time in the main viewing window. Optionally, you can open the Thumbnails window (**View > Windows > Thumbnails**) to preview a specified number of images.

- To preview document(s) as thumbnails, enter the number to display at a time in the **Number of Thumbnails** field.
- If you want to display only one document at a time, select **Only Display Current Document**. Leave this check box blank to view all of the documents in the batch.
- If you want the Browse Batch window to retain its last position and state (open or closed), select **Retain Browse Batch Docking**. When this option is disabled, the Browse Batch window will not retain its last location or state, and it will not open automatically, even if it was open when you last closed the batch.
- If you want the Thumbnails window to retain its last position and state (open or closed), select **Retain Thumbnail Docking**. When this option is disabled, the Thumbnails window will not retain its last location or state, and it will not open automatically, even if it was open when you last closed the batch.

> **Note**:
>
> Disabling the Retain Browse Batch Docking and/or Retain Thumbnail Docking options may improve performance in the Operator Console.

- If you want to display a high quality image while scanning documents, select **Show High Quality Image While Scanning.** When this option is enabled, scanning speeds will decrease.

Multiple Display

You can view multiple images at a time in the main window (**View > Organization > Multiple Display**) and specify how many images appear per row and column.

- For multiple-page documents, enter the number of rows/columns to display at a time in the **Rows** and **Columns** fields.
- Select **Only Display Current Document** to view only the current document in the batch. Leave this check box blank to view all of the documents in the batch.
- If you want the Browse Batch window to retain its last position and state (open or closed), select **Retain Browse Batch Docking**. When this option is disabled, the Browse Batch window will not retain its last location or state, and it will not open automatically, even if it was open when you last closed the batch.

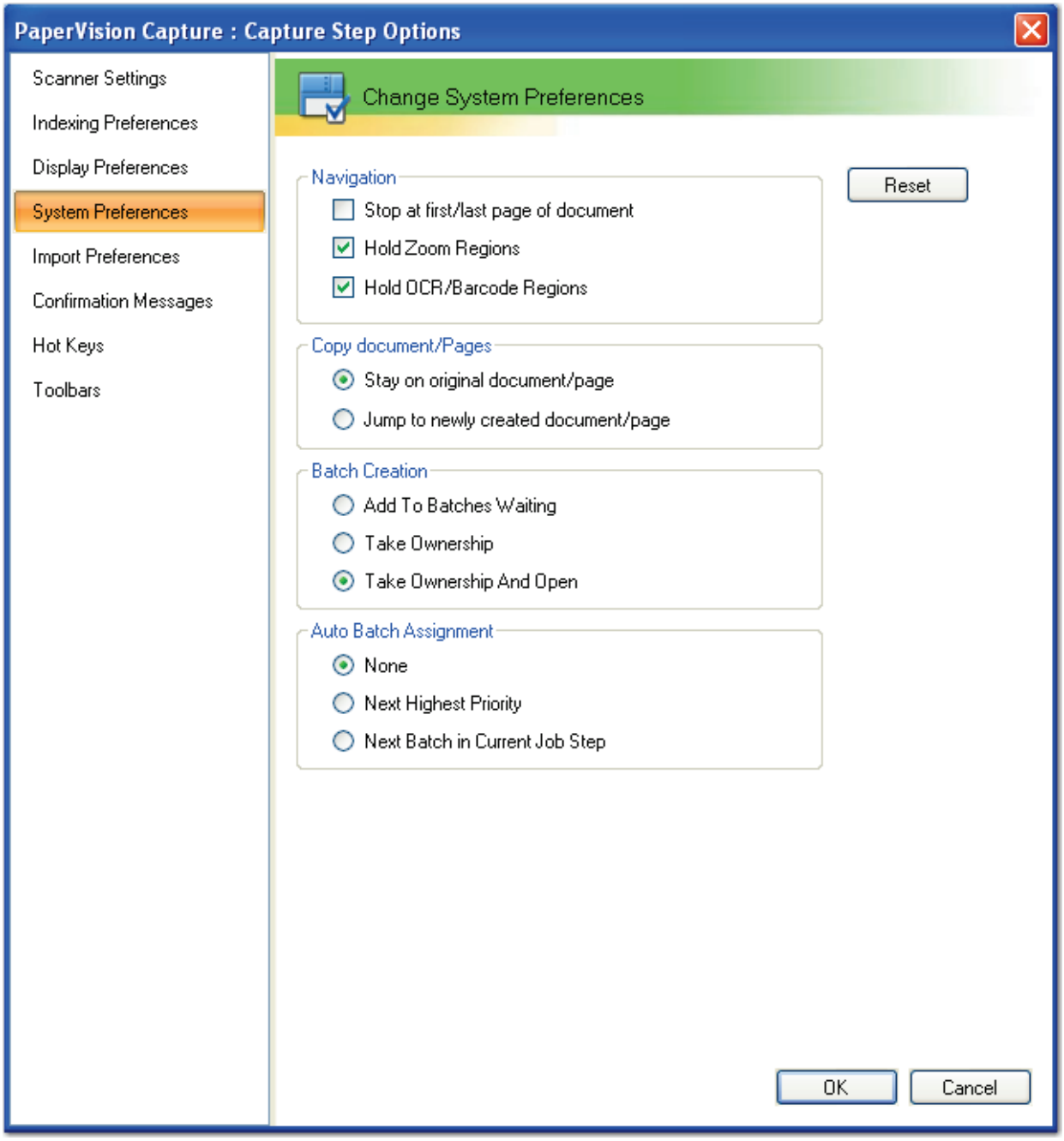
> **Note**:
>
> Disabling the Retain Browse Batch Docking option may improve performance in the Operator Console.

Images

Select the **Preferred Bitonal** setting for dual-stream scanners.

System Preferences

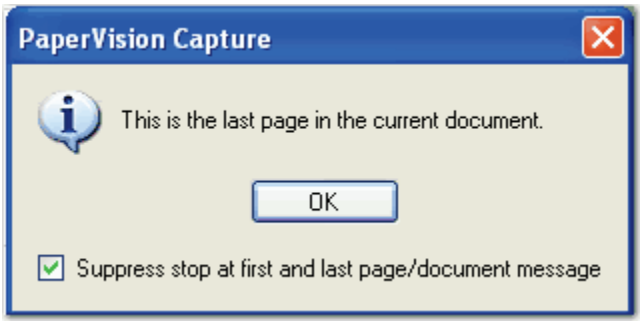
The System Preferences screen contains settings for document and page navigation in the PaperVision Capture Operator Console. Additionally, you can select how batches are assigned to you.



System Preferences

Navigation

If you enable **Stop at first/last page of document,** an informational message appears if you attempt to navigate before the first page/document or beyond the last page/document. When this option is disabled and you navigate to the previous page of a document (when you are already on the first page), you are taken to the last page of the current document. Conversely, when you navigate to the next page of a document (when you are already on the last page), you are taken to the first page of the current document. The same results occur when you move between documents. Each time the message appears, you can choose to suppress the message in the future.


PaperVision Capture
This is the last page in the current document.
OK
Suppress stop at first and last page/document message

First/Last Page Message

Hold Zoom Regions

If you enable the **Hold Zoom Regions** setting, a zoom region that you set within an image will be retained as you navigate through the document.

Hold OCR Barcode Regions

If you enable the **Hold OCR Barcode Regions** setting, an OCR or barcode region that you set within an image will be retained as you navigate through the document.

Copy Document/Pages

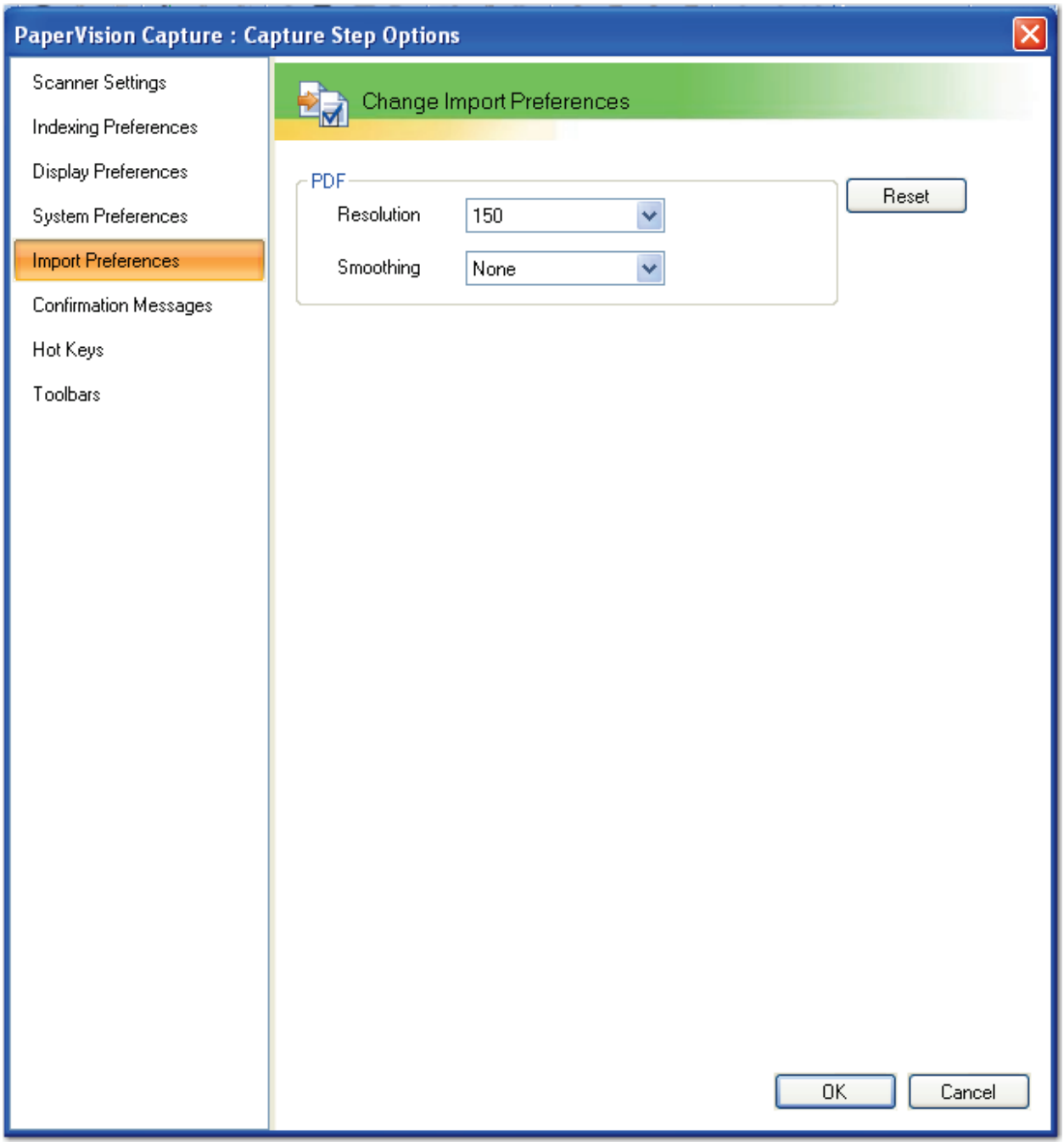
This option assigns whether the original document/page (**Stay on original document/page**) or the copied document/page (**Jump to newly created document/page**) will open after you copy the existing document or page.

Batch Creation and Auto Batch Assignment

Information on Batch Creation and Auto Batch Assignment settings can be found in the sections on **Auto Batch Assignment** in Chapter 2.

Import Preferences

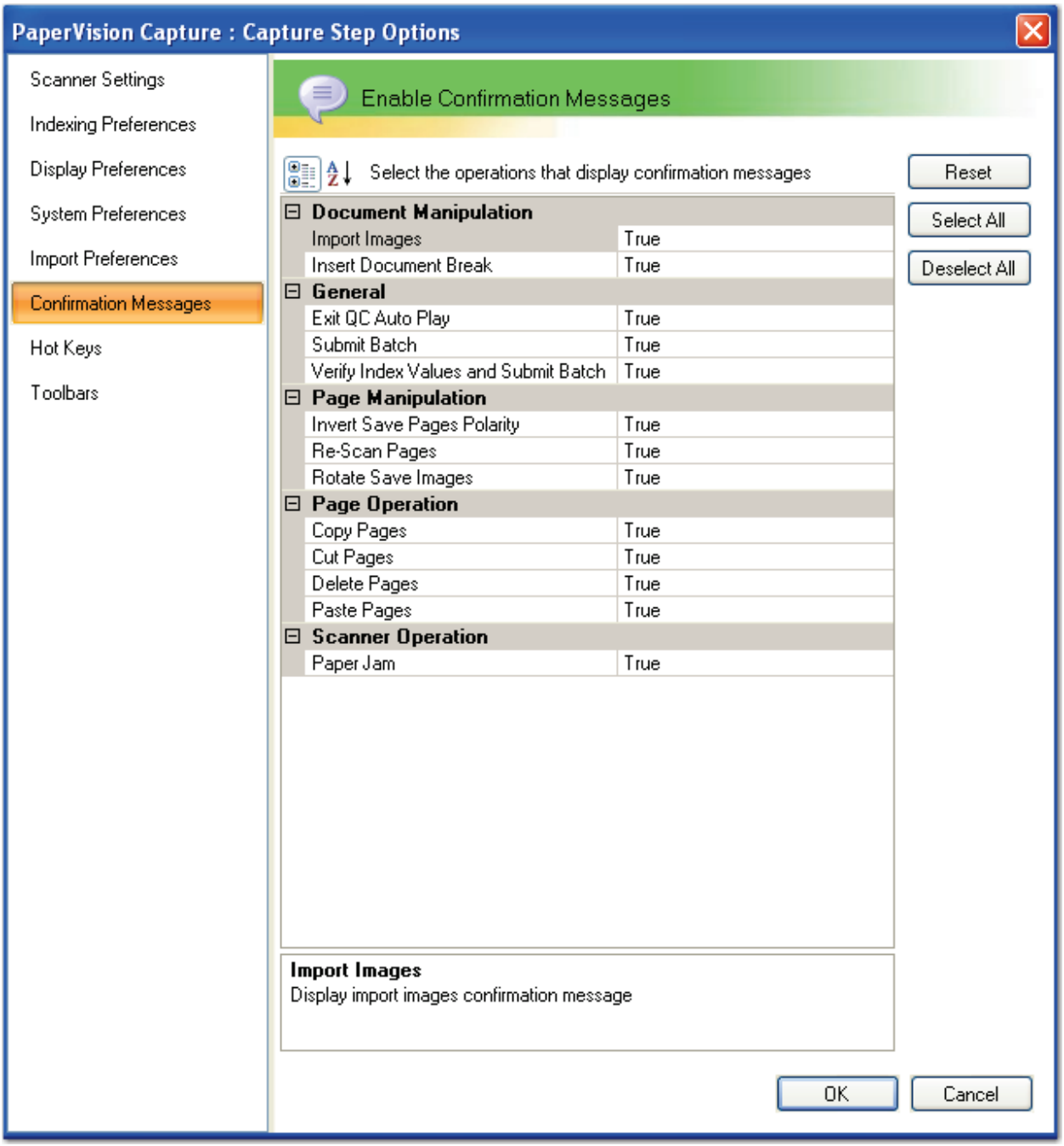
During the Import Batch and Import Images operations for PDF files, you can select the default resolution and smoothing settings. Higher resolution and smoothing settings may help improve the quality of PDF files during import operations. The default resolution is 150 dpi, and no smoothing is enabled by default.



Import Preferences

Confirmation Messages

During specific operations in the PaperVision Capture Operator Console, such as cutting/pasting, copying/pasting, and deleting pages, you are presented with a confirmation message before the operation executes. These settings allow you to display or suppress confirmation messages that appear during specific events. The following confirmation messages appear by default (except for scanner paper jam messages), but you can remove the check marks to prevent these messages from appearing each time you execute an operation.



Confirmation Messages

Document Manipulation

Confirmation messages for the following document manipulation operations can be enabled or suppressed:

- Import Images
- Insert Document Break

General

Confirmation messages for the following general operations can be enabled or suppressed:

- Exit QC Auto Play
- Submit Batch
- Verify Index Values and Submit Batch

Page Manipulation

Confirmation messages for the following page manipulation operations can be enabled or suppressed:

- Invert Save Pages Polarity
- Re-Scan Pages
- Rotate Save Pages

Page Operation

Confirmation messages for the following page operations can be enabled or suppressed:

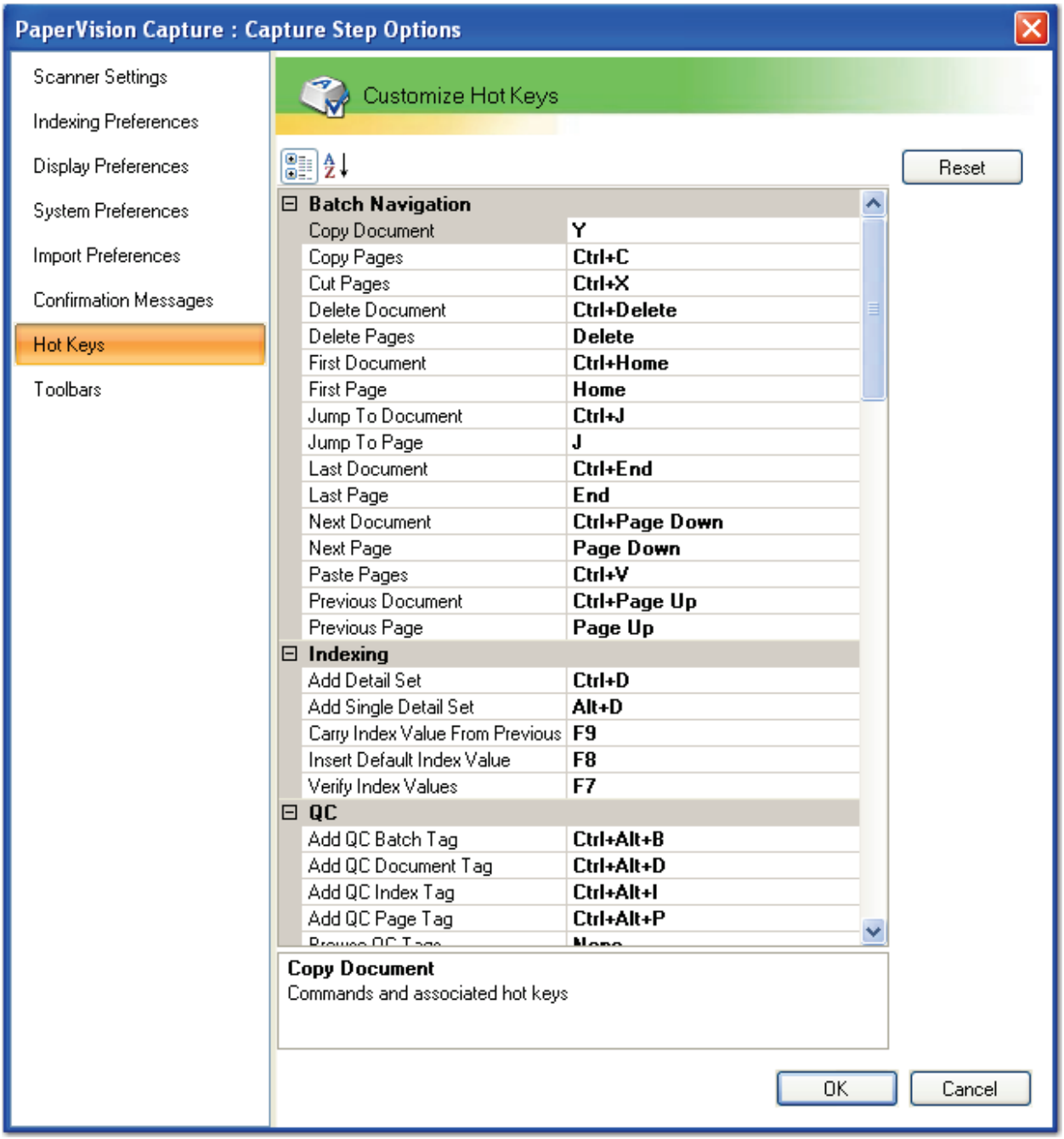
- Copy Pages
- Cut Pages
- Delete Pages
- Paste Pages

Scanner Operation

If you want to be notified when the scanner encounters paper jams, select **Display Paper Jam Messages**.

Hot Keys

PaperVision Capture's default hot key settings are described in this section. You can customize each hot key with a different keystroke combination.



Hot Keys

The Customize Hot Keys screen includes the following sorting views:

- To view properties by category, click the **Categorized** icon.
- To view properties in alphabetical order, click the **Alphabetical** icon.

Batch Navigation

- Copy Document: Y
- Copy Pages: Ctrl+C
- Cut Pages: Ctrl+X
- Delete Document: Ctrl+Delete
- Delete Pages: Delete
- First Document: Ctrl+Home
- First Page: Home
- Jump to Document: Ctrl+J
- Jump to Page: J
- Last Document: Ctrl+End
- Last Page: End
- Next Document: Ctrl+Page Down
- Next Page: Page Down
- Paste Pages: Ctrl+V
- Previous Document: Ctrl+Page Up
- Previous Page: Page Up

Indexing

- Add Detail Set: Ctrl+D
- Carry Index Value From Previous Document: F9
- Insert Default Index Value: F8
- Verify Index Values: F7

QC (Quality Control)

- Add QC Batch Tag: Ctrl+Alt+B
- Add QC Document Tag: Ctrl+Alt+D
- Add QC Index Tag: Ctrl+Alt+I
- Add QC Page Tag: Ctrl+Alt+P
- Exit QC Auto Play: Ctrl+Alt+E
- Next QC Group: Ctrl+Alt+N
- Pause QC Auto Play: Ctrl+Alt+W
- Previous QC Group: Ctrl+Alt+R
- Remove QC Tag: Shift+Ctrl+Delete
- Restart QC Auto Play: Ctrl+Alt+S
- Start QC Auto Play: Ctrl+Alt+Q

Note:

The Browse QC Tags and QC Tag Details commands can be configured using the hot keys that you define. By default, these commands are undefined.

Scanning

- Configure Scanner Settings: E
- Decrease Brightness: Shift+F2
- Decrease Contrast: Shift+F4
- Increase Brightness: F2
- Increase Contrast: F4
- Insert Pages After: Ctrl+A
- Insert Pages Before: Ctrl+B
- Mark New Document and Scan: M
- Re-Scan Page: A
- Saved Scanner Settings: Ctrl+F6
- Scan One Page: O
- Scan Pages : S
- Stop Scanner: Escape

Note:

The Single Display and Multiple Display commands can be configured using the hot keys that you define. By default, these commands are undefined.

Standard

- Add Document: Shift+Ctrl+A
- Batch Information: Ctrl+I
- Clear Filters: Shift+Ctrl+F
- Document History: Ctrl+H
- Help Topics: F1
- Image Information: I
- Insert Document Break: Ctrl+Insert
- Manual Barcode Index: Shift+Ctrl+B
- Manual OCR Index: Shift+Ctrl+O
- Merge Index Values: F5
- Merge Like Documents: Ctrl+F5
- Print Current Document: P
- Remove Document Break: Ctrl+R
- Re-Save Page: V
- Reset Image: Ctrl+T
- Rotate 90°: R
- Scale to Height: H
- Scale to Width: W
- Scale to Window: Ctrl+W
- Scroll Image Down: Ctrl+Down Arrow
- Scroll Image Left: Ctrl+Left Arrow
- Scroll Image Right: Ctrl+Right Arrow
- Scroll Image Up: Ctrl+Up Arrow
- Set Focus to Browse Batch: F6
- Set Focus to Index Manager: Ctrl+Q
- Shuffle Document to Duplex: U
- Submit and Create New Batch: Shift+C
- Submit Batch (Complete): Shift+S
- Submit Batch (Incomplete): Shift+I
- Zoom In: Ctrl+Plus Sign
- Zoom Out: Ctrl+Minus Sign

Additional Standard Hot Keys

Although the following commands are undefined by default, you can configure these as well.

- About
- Batch Document Grid Form
- Batch Import
- Batch Scrollbar
- Execute Custom Code
- Exit Application
- Extract and Copy Region
- Help Manual
- Import Images
- Invert Page Polarity
- Invert and Save Page Polarity
- Move to Next Field
- Move to Previous Field
- Options
- Preferred Bitonal
- Rotate 270
- Rotate and Save Images
- Set Focus to Browse QC Tags
- Set Focus to QC Tag Details
- Show Status Bar
- Thumbnails
- View Index Manager

Customizing Hot Keys

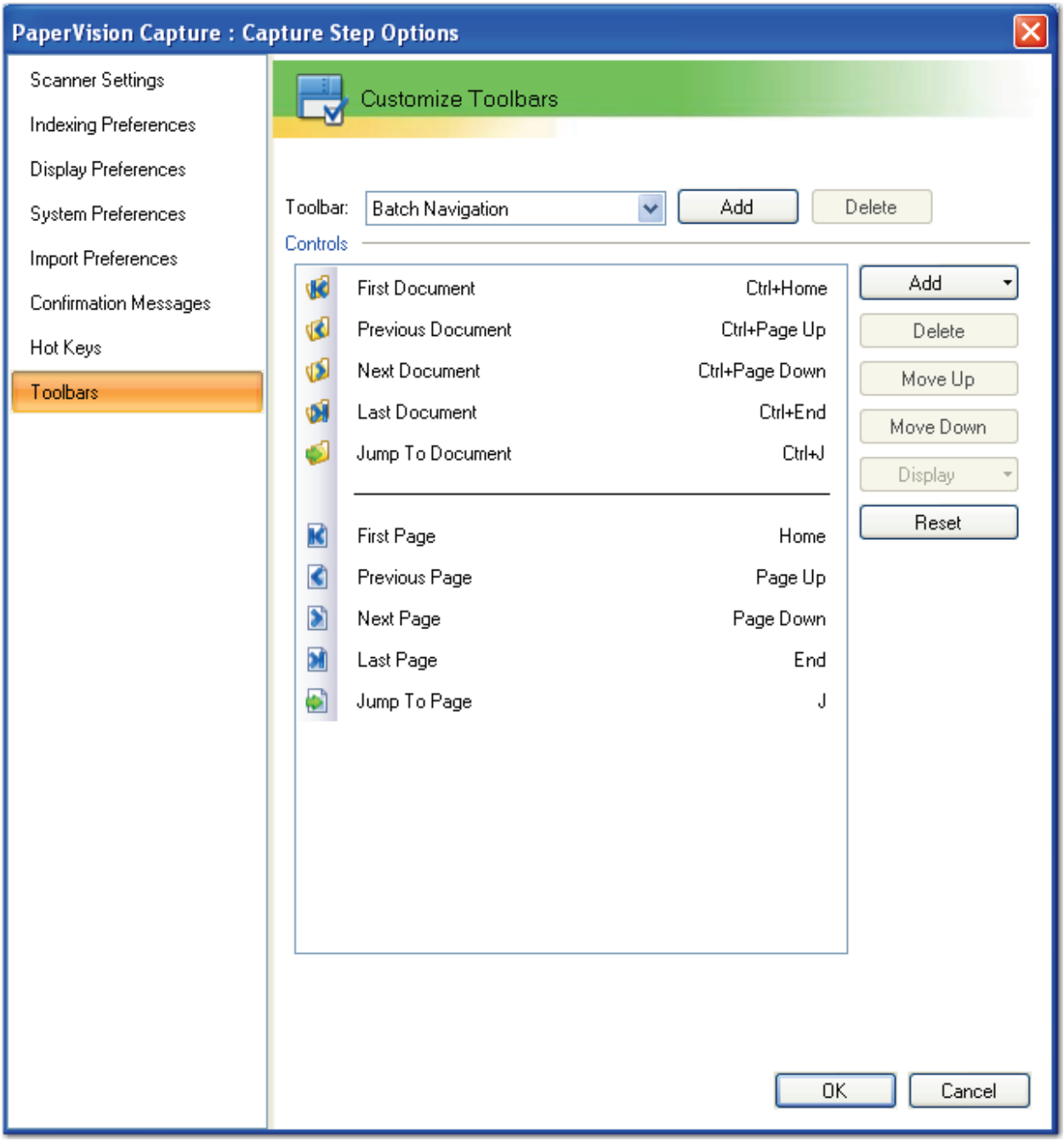
You can customize hot keys for any of the commands found in this screen.

To customize hot keys:

1. Expand the main category node (**Batch Navigation, Indexing, Scanning,** or **Standard).**
2. Click the row of the command to modify.
3. Open the drop-down menu in the right column.
4. Select from the **Key** drop-down list.
5. Select the additional keys (**Alt, Shift,** or **Ctrl**) that comprise the hot key setting (optional).
6. Click outside the command's row to apply the changes.

Toolbars

PaperVision Capture's toolbars (Batch Navigation, Indexing, Scanning, and Standard) can be customized with your specified commands, labels, and separators (lines used to separate related commands on a toolbar). Additionally, you can add new toolbars to the PaperVision Capture Operator Console.



Toolbars

Batch Navigation

- First Document
- Previous Document
- Next Document
- Last Document
- Jump to Document
- First Page
- Previous Page
- Next Page
- Last Page
- Jump to Page

Indexing

- Save Indexes
- Add Detail Set
- Verify Index Values

Additional Indexing Toolbar Commands

Although the following commands are undefined by default, you can configure these as well.

- Insert Default Index Value
- Carry Index Value from Previous Document

QC

Although the Browse QC Tags and QC Tag Details toolbar commands are undefined by default, you can configure these as well.

- Start QC Auto Play
- Pause QC Auto Play
- Exit QC Auto Play
- Restart QC Auto Play
- Previous QC Group
- Next QC Group
- Add QC Batch Tag
- Add QC Document Tag
- Add QC Page Tag
- Add QC Index Tag
- Remove QC Tag

Scanning

- Scan Pages
- Stop Scanner
- Mark New Document and Scan
- Scan One Page
- Re-Scan Pages
- Saved Scanner Settings

Additional Scanning Toolbar Commands

Although the following commands are undefined by default, you can configure these as well.

- Decrease Brightness
- Decrease Contrast
- Increase Brightness
- Increase Contrast
- Insert Pages Before
- Insert Pages After
- Combo Preferred Bitonal

Standard

- Delete Page
- Copy Pages
- Cut Pages
- Paste Pages
- Re-Save Page
- Add Document
- Delete Document
- Print Documents
- Single Display
- Multiple Display
- Reset Image
- Invert Page Polarity
- Rotate 90°
- Scale to Window
- Scale to Width
- Scale to Height
- Zoom In
- Zoom Out
- Insert Document Break
- Remove Document Break
- Submit Batch (Complete)
- Submit Batch (Incomplete)
- Submit and Create New Batch
- Options
- Execute Custom Code
- Merge Index Values

Additional Standard Toolbar Commands

Although the following commands are undefined by default, you can configure these as well.

- Batch Information
- Copy Document
- Shuffle Document to Duplex
- Image Information
- Scroll Image Down
- Scroll Image Left
- Scroll Image Right
- Scroll Image Up
- Rotate 270°
- Thumbnails
- Extract and Copy Region
- Exit Application
- Batch Document Grid Form
- Help Topics
- Help Manual
- Import Images
- Show Status Bar
- Customize Toolbars
- About
- Batch Import
- Invert Page Polarity
- View Index Manager
- Merge Like Document

Adding and Removing Toolbars

You can add and remove toolbars in the PaperVision Capture Operator Console.

To add a new toolbar:

1. Click the **Add** button next to the **Toolbar** drop-down menu.
2. In the **Enter Toolbar Name** dialog box, type the new name.
3. Click **OK.**

To remove a toolbar:

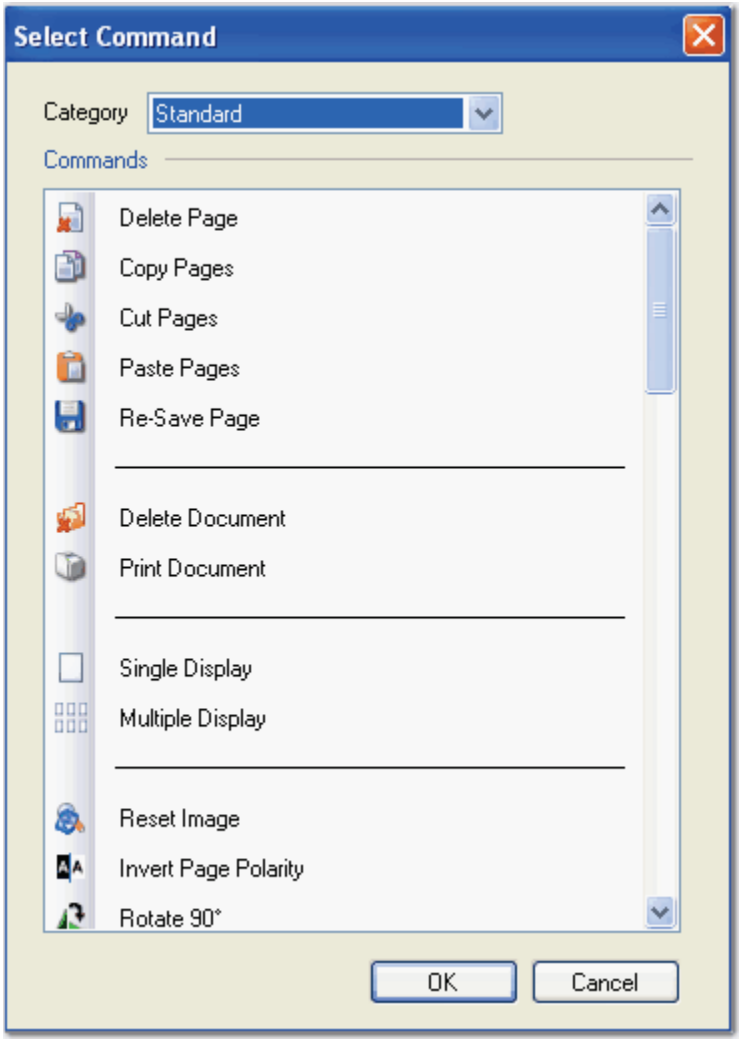
1. Select the toolbar from the **Toolbar** drop-down menu.
2. Click the **Delete** button.
3. Click **Yes** to confirm the deletion.

Adding Commands, Labels, and Separators

You can add commands, labels, and separators to toolbars.

To add a command:

1. Click the **Add** button next to the **Controls** list.
2. In the drop-down menu, click **Command**, which opens the **Select Command** dialog box.



Select Command

3. Select from the **Category** drop-down menu.
4. Highlight the command to add to the toolbar.
5. Click **OK.**

To add a label:

1. Click the **Add** button next to the **Controls** list.
2. In the drop-down menu, select **Label.**
3. Type the label's name in the blank field on the right.
4. Click outside the field, and it will appear in the list.

To add a separator between commands:

1. Click the **Add** button next to the **Controls** list.
2. In the drop-down menu, select **Separator**, and it will appear in the list.

Deleting, Moving, and Editing Commands, Labels, and Separators

You can delete and reorder commands, labels, and separators that appear in the PaperVision Capture Operator Console.

To delete a command, label, or separator:

1. Highlight the item in the **Controls** list.
2. Click the delete button next to the **Controls** list.
3. Click **OK** to confirm the deletion.

To move a command, label, or separator in the toolbar:

1. Highlight the item in the **Controls** list.
2. Click the **Move Up** or **Move Down** button.

To change the display of a command:

1. Select the appropriate toolbar.
2. Highlight the command in the **Controls** list.
3. Click the **Display** button.
4. In the drop-down menu, select **Image Only, Text Only,** or **Image and Text.**

Changing the Toolbar Display

You can change a toolbar's appearance in the PaperVision Capture Operator Console. To change any of the toolbars, select the toolbar from the drop-down menu; then highlight the appropriate toolbar command from the **Controls** list. You can select how to display toolbar icons (as images only, text only, or as both images and text). By default, all toolbar icons display only the images.

To change the toolbar icon:

1. Click the drop-down arrow in the **Display** button.
2. Select **Change Button Image**.
3. Select the new image from the list.

To reset the toolbar icon:

1. Click the drop-down arrow in the **Display** button.
2. Select **Reset Button Image**.
3. Click **Yes**, and the icon returns to its original image.

To select the toolbar icon display:

1. Click the drop-down arrow in the **Display** button.
2. Ensure a check mark appears next to your selection.
   - **Image Only** displays only the graphic.
   - **Text Only** displays only the name of the command.
   - **Image and Text** displays both the graphic and the name of the command.

Resetting Toolbars

You can reset PaperVision Capture toolbars to their original settings.

> **Note:**
>
> Only the standard toolbars (Batch Creation, Indexing, Scanning, and Standard) can be reset to their original settings.

To reset toolbars:

1. Select the toolbar from the drop-down menu.
2. Click the **Reset** button.
3. Click **OK.**

Appendix A – Additional Help Resources

At Digitech Systems, we provide multiple resources to help find answers to your questions.

Technical Support

Contact our legendary customer support staff Monday through Friday between the hours of 8 a.m. and 6 p.m. Central Time for answers to your questions about our products.

Direct: (402)484-7777

Toll-free: (877)374-3569

Email: support@digitechsystems.com

Help on the Web

MyDSI is an interactive tool for all Digitech Systems customers. Log in to http://mydsi.digitechsystems.com to download product updates, license purchased software, view support contract renewals, and check the status of your software support cases and requests.

User Forums

Log in to http://forums.digitechsystems.com to exchange answers and ideas with other users in our moderated community.

Knowledge Base

Log in to http://kb.digitechsystems.com to search our extensive Knowledge Base for articles on all Digitech Systems products.

Index

A

adding a document 28
auto batch assignment 17

B

barcode indexing (manual) 41
batch
  definition 6
  opening 13
  undo ownership 15
batch creation screen 12
batch import
  automated 60
  manual 59
batch priority 6
batches
  assuming ownership 13
  creating 13
  importing 60
  opening 14
  releasing ownership 15
  retransmitting 15
  submitting 24
  submitting and creating new 24, 27
  submitting complete 14, 26
  submitting incomplete 14, 26
Batches Owned list 13
Batches Waiting list 12
Browse Batch window 48

C

Capture job step
  Edit menu 62, 72
  introduction 56
  View menu 62, 69, 72
columns
  ordering 18
commands
  adding 107
confirmation messages 93
custom code
  executing 38

D

deleting documents
  from Browse Batch window 48
deleting QC tags
  from Browse Tags window 50
detail set 6
display preferences 69, 72, 88
  multiple display 89
document
  definition 7
documents
  copying 28
  delete 20
  deleting 28
  deleting in Browse Batch 29
  inserting document breaks 24, 29
  merging like 40
  navigating 46
  printing 20
  removing document breaks 24, 29
  shuffling to duplex 30

E

Edit menu 28

F

File menu 25

H

help
  obtaining 11
  resources 110
hot keys
  Additional Standard 99
  Batch Navigation 96
  customizing 96, 100
  Indexing 96
  Scanning 97
  Standard 98

I

image
  definition 7
images
  extracting and copying regions 35
  importing 25
  resetting 45
  resetting view of 21
  rotating 21, 45
  scaling 45
  scaling to height 22
  scaling to width 22
  scaling to window 22
  zooming in 22
  zooming out 22
import preferences 82, 92
importing
  PDF files 82
index
  definition 7
Index Manager
  in Capture step 63
index values
  merging 38

index verification settings 87
indexes
  saving 68
  verifying 69
Indexing job step
  adding detail sets 67
  Edit menu 69
  introduction 66
  Tools menu 64, 69
Indexing step settings
  general 87

J

job
  definition 7
job step
  definition 7

L

labels
  adding 107
logging in 10
logging out 10

M

manual barcode index 41
manual OCR index 42
Mark New Document and Scan 62
Master Batch Repository
  definition 7
merging
  index values 38
  like documents 40

O

OCR indexing (manual) 42

P

page
  definition 7
  deleting a 19
pages
  copying 19
  cutting 19
  deleting 34
  inverting polarity 21, 36, 45
  navigating 47
  pasting 20
  printing 26
  re-saving 20, 35
  single display 20
PaperVision Capture Administration Console 7
PaperVision Capture Automation Service 8
PaperVision Capture Data Transfer Agent Service 8
PaperVision Capture Gateway Server 8
PaperVision Capture Operator Console 8
PDF files
  importing 82, 92

Q

QC Auto Play operations 75
QC menu and toolbar 74
QC Tag Details window 80
QC Tags
  applying batch tags 77
  applying document tags 77
  applying index tags 78
  applying page tags 78
  removing 79

R

removing QC Tags 79
Retain Browse Batch Docking option 89
Retain Thumbnail Docking option 89
right-clicking
  in Browse Batch window 48
  in QC Tag Details 81

S

scaling and zooming 23
Scanner menu 61
  toolbar commands 61
scanner settings 82–85
  brightness 85
  color format 84
  contrast 85
  dither 84
  horizontal resolution 84
  page size 84
  scan type 84
  vertical resolution 84
scanners
  ISIS-compatible 82
  supported 10
  Twain 82
separators
  adding 107
settings
  Operator Console 82
  scanner 82–85
Standard toolbar
  commands 19–24
status bar 53
system preferences 90
system preferences
  navigation 91
system preferences
  Copy Document/Pages 91
system preferences
  batch creation and assignment 91
system requirements 9

T

toolbars 101
adding and removing 106
Additional Standard commands 105
Batch Navigation 102
Indexing 102
Scanning commands 103
Standard commands 104
viewing and hiding 52
Tools menu 54

U

users
supported 8

V

verifying index values 69
View menu 45

W

windows
viewing and hiding 47

Z

zoom regions 91